DOCUMENT RESUME

ED 365 871 CE 065 627

AUTHOR Faulkner, Ann B.; And Others
TITLE Learning To Read Office Technology Publications.
INSTITUTION Brookhaven Coll., TX.
SPONS AGENCY Texas State Higher Education Coordinating Board, Austin.
PUB DATE 93
NOTE 206p.; Photographs may not copy clearly.
PUB TYPE Guides - Classroom Use - Teaching Guides (For Teacher) (052) -- Guides - Classroom Use - Instructional Materials (For Learner) (051)

EDRS PRICE MF01/PC09 Plus Postage.
DESCRIPTORS *College Preparation; Compensatory Education; *Developmental Studies Programs; Educationally Disadvantaged; Higher Education; Human Factors Engineering; Instructional Materials; Metacognition; *Office Automation; Office Occupations Education; *Reading Comprehension; Remedial Programs; *Remedial Reading; Skill Development; Study Guides; Teaching Methods; Textbooks

ABSTRACT

This guide is designed to offer interesting, authentic practice in reading college-level technical textbooks and periodical articles. The book contains actual reading assignments and strategies to help students improve comprehension and to develop metacognitive insight into their own reading processes. The guide is presented in three levels, each organized around a theme. The Level 1 materials, which provide the most support and direction for students, all relate to "A Future in Office Technology" (four publications). In Level 2, where there is slightly less support, the topic is "Office Technology Workers" (four publications). In Level 3, where the greatest independence is asked of students, the publications all relate to "Ergonomics in Office Technology" (two publications). The final assignment is an essay question requiring a comparison of the two Level 3 articles. Each selection includes before, during, and after reading exercises, followed by the publication, and an answer key. An annotated bibliography lists 10 publications and includes information about the ways in which articles and guides are related. (KC)

****
* Reproductions supplied by EDRS are the best that can be made *
* from the original document. *
****

ED 365 871

Learning to Read Office Technology Publications

Ann B. Faulkner
Project Curriculum Writer
Reading Professor

Linda H. Lee
Project Director
Director of Instructional Development

Anita M. Landenberger
Project Content Specialist
Office Technology Professor

U.S. DEPARTMENT OF EDUCATION
Office of Educational Research and Improvement
EDUCATIONAL RESOURCES INFORMATION CENTER (ERIC)

✓ This document has been reproduced as received from the person or organization originating it.

☐ Minor changes have been made to improve reproduction quality.

• Points of view or opinions stated in this document do not necessarily represent official OERI position or policy.

PERMISSION TO REPRODUCE THIS MATERIAL HAS BEEN GRANTED BY

SCallert

TO THE EDUCATIONAL RESOURCES INFORMATION CENTER (ERIC).

A project produced by **Brookhaven College**
Dallas County Community College District,
with funding from the
Texas Higher Education Coordinating Board,
Carl D. Perkins Vocational Education Funds,
1993

CE065627

Educational opportunities are offered by the Dallas County Community College District without regard to race, color, age, national origin, religion, sex, or handicap.

BEST COPY AVAILABLE

Project Team

Linda H. Lee, M.A.
Project Director
Director of Instructional Development

Ann B. Faulkner, M.A.
Project Curriculum Writer
Reading Professor

Anita M. Landenberger, M.S., CPS
Project Content Specialist
Office Technology Professor

Gloria L. Macklin, B.S.Ed.
Production Assistant

Mary A. Brumbach, Ph.D., CFRE
Director of Resource Development

Advisory Committee

Arlene J. Kostoch, Ph.D.
Dean
Division of Occupational
Education and Technology
Del Mar College

Dorothy E. McNutt, Ed.D
Chairperson
Division of Business
College of the Mainland

Gail Platt, Ph.D.
Director
Learning Center
South Plains College

Richard Pulaski, Ed.D.
Director
Technical-Vocational Division
Angelina College

Terry C. Walch, Ed.D.
Perkins Grant
Program Director
Texas Higher Education
Coordinating Board

Table of Contents

A Note to the Instructor iv

A Note to the Student vii

Annotated Bibliography ix

Student Reading Inventory xii

Instructor Feedback Form xiii

Publications and Guides ..... Following

A Note to the Instructor

Learning to Read Office Technology Publications (LROTP), along with its companion volume, ***Learning to Read Child Development Publications (LRCDP),*** is the latest in a series of career-related materials we have produced with the aid of a Carl Perkins Discretionary Grant awarded by the Texas Higher Education Coordinating Board. The materials are designed to offer interesting, authentic practice in reading college-level technical textbooks and periodical articles. The basic plan has remained the same over the three years in which we have been developing these materials. Students are presented with actual reading assignments and guided in using strategies to improve comprehension and to develop metacognitive insight into their own reading process. However, our experience in developing and using these materials has suggested some changes that we have incorporated in ***LROTP*** and ***LRCDP***.

A topical approach connects the publications in each level. While the three levels still represent the level of support provided in the Guide, a common theme now runs through the publications in a given level. Thus, the Level 1 materials, which provide the most support and direction for students, all relate to "A Future in Office Technology." In Level 2, where there is slightly less support, the topic is "Office Technology Workers." In Level 3, where the greatest independence is asked of students, the publications all relate to "Ergonomics in Office Technology." The final assignment is an essay question requiring a comparison of the two Level 3 articles. By reading several related articles, students begin to feel knowledgeable about a topic, and that's a wonderful feeling for developmental reading students who have rarely had the experience of being "experts" in academic subject matter. Reading related articles also seems to increase the persistence of often-discouraged readers, and the completion of an exam over the material offers a valuable opportunity to judge their own study effectiveness. The ***Annotated Bibliography*** includes information about the ways in which articles and Guides are interrelated.

Another change is an increase in the number of articles in each level. Having found that even high-level developmental students need considerable practice with strategies in order to internalize them, we have added more articles at each level. Thus, there are four publications with maximum support, four with moderate support, and two with minimum support.

As we've grown more sophisticated about the actual production of these materials, it has become possible to use a common page numbering system for both the Guide and the publication. Further, we have separated the ***Answer Key*** from the exercises, so that each selection includes ***Before***, ***During***, and ***After Reading*** exercises, followed by the publication, followed by the ***Answer Key***. Answers are included to allow students to gauge their results as they go along and to down play the "rightness" of the back of the book. However, reading students have said that they don't like having the answers readily available; they can't resist the temptation to use them as a substitute for thinking. You may prefer to remove the answers entirely, making them available only to students who can show they've completed the exercise. By placing them after the article, we hope to minimize temptation and make it easier to locate and remove the ***Answer Key*** for those of you who wish to keep them in a separate place.

Finally, we have printed the Guides on only one side of the paper. Feedback from users indicates that one-sided printing facilitates copying. As you may recall from previous volumes, there are no restrictions on copying the exercises and answers that are the work of the listed team. On the other hand, permission to copy the publications was granted for this project only. We have provided the information developed in our copyright permission efforts in the hope that it will help you request permission to make copies of the publications themselves.

The rationale for using technical publications grew out of the need to offer developmental reading students a window on the "real" college courses that they are preparing to study. The materials work well with groups of students who plan to major in one of these fields. For example, many colleges have enough pre-nursing students to make offering a special developmental reading course "just for them" cost effective. But the topics and publications have been chosen for their general appeal, too. The tech-occ faculty who have selected the publications used in this series have conscientiously avoided choosing advanced texts that require specialized background knowledge. Instead, we have included articles accessible to those with only a general background. Using office technology subject matter with students in the typical reading class might inspire some students to consider taking a course or majoring in that field, and almost every student will find relevant and interesting topics such as "Do Women Make Better Managers?" and "The Workplace of the Future." Therefore, you may wish to supplement the general academic practice material available in most reading textbooks with these technical publications.

If this is the first time you have seen one of our volumes, we hope you will look for the others:

- ***Learning to Read Nursing Publications***
- ***Learning to Read Automotive Publications***
- ***Learning to Read Computer Publications***
- ***Learning to Read Fashion Publications***

They were distributed in the late summer of 1991 and 1992 to all public, two-year colleges in Texas. If you use any of these materials, we hope you'll give us your feedback. There's an evaluation form on page xiii. We look forward to hearing from you.

***Ann Faulkner**, Reading Professor*
***Linda Lee**, Instructional Development Consultant*
***Anita Landenberger**, Office Technology Professor*
Brookhaven College
3939 Valley View Lane
Farmers Branch, TX 75244
214/620-4851

A Note to the Student

Learning to Read Office Technology Publications represents our latest effort to prepare materials that will help you read more effectively in your college courses. During the development of the five other titles in this series

- ***Learning to Read Nursing Publications***
- ***Learning to Read Automotive Publications***
- ***Learning to Read Computer Publications***
- ***Learning to Read Fashion Publications***
- ***Learning to Read Child Development Publications***

we have learned some useful things about the kinds of materials students have to read in college and the results they need to obtain from their reading.

The publications included in this volume were all selected by the office technology professor on our team because they were typical of the kinds of reading her students have to do. She also checked the various exam questions for similarity to the kinds of questions students in office technology courses are asked. Another aspect of these materials which makes them like what you have to do in college is that they are complete. Instead of reading a paragraph or two, you will be reading whole chapters and articles. By doing so, you will gain experience in organizing your study time and monitoring your concentration as well as in understanding the material. These are all tasks that you need to perform—independently, without being reminded—when you are taking any college course.

These materials are arranged to give you practice in the process of reading. In recent years, both writing and reading have come to be viewed as more than just a product (a written essay or the facts memorized from reading). The process approach stresses a variety of activities to help the reader or writer prepare for the task, engage in the task, and then refine the results. In the case of reading, this approach involves thinking about your background and discovering the author's organization *before reading*, keeping your purpose in mind *during reading*, and taking notes and reviewing *after reading*.

The Guides which accompany each publication contain a *Purpose for Reading* that is like the explanation of an assignment a teacher might make in class. The Guides for Level 1 publications have the most exercises; they're designed to give you lots of practice in every phase of the reading process. In Level 2, the Guides have fewer exercises, and Level 3 has the fewest of all.

As you advance through the levels you will develop the habit of demanding from yourself appropriate comprehension—your sense of whether you do or don't understand will guide what you do in the reading process. There is

usually some sort of final exercise, often a multiple choice exam or an essay question, that will give you feedback on the effectiveness of your study. While it's easy to pretend to yourself that you would have tried harder or remembered more if the exercise had been "real," you'll learn more about yourself as a student if you give these readings your best. Instead of just "getting by," give each of the exercises your full effort, then evaluate the results and develop a plan to improve your study methods on the next assignment.

Some students say that they have to study harder with these materials than they have ever done with any school work. That may be true—especially for students who have been just getting by in their academic work. These materials offer you an opportunity to practice being a very good student, not just an average one. As you develop your inner sense of whether you are understanding what you read, you will make better decisions about how much effort is required of you on a particular assignment. Our goal is to help you be both efficient and excellent!

***Anita Landenberger**, Office Technology Professor*
***Ann Faulkner**, Reading Professor*
***Linda Lee**, Instructional Development Consultant*
Brookhaven College
3939 Valley View Lane
Farmers Branch, TX 75244

Annotated Bibliography
Office Technology Publications

Level 1: A Future in Office Technology

1A Mahaffie, John B. "The Workplace of the Future." The Secretary. June/July 1992: 29-32.

This four-page article outlines changes in technology and business practices which offer secretaries an opportunity to shape their future jobs. Students are asked to read for main ideas and to summarize each major section of the article.

1B Busche, Don and Bernice T. Glenn. Chapter 2: "Communication: Visual and Verbal." The Desktop Design Workbook. Englewood Cliffs, NJ: Regents/Prentice Hall, 1992: 21-36.

In this chapter the authors introduce concepts of visual and verbal communications. Graphics are used extensively, giving the chapter a particularly lively appearance. Students are asked to study the chapter carefully, using the review questions to guide their learning. Four test items give students a chance to judge the effectiveness of their efforts.

1C Ober, Scott. "Spotlight on Technology." Contemporary Business Communication. Boston: Houghton Mifflin, 1992: 559.

A one-page text excerpt presents several different aspects of an electronic job search process. Students are encouraged to read to satisfy personal goals. The ***After Reading*** *activities stress personal reactions and learning more about the topic in the student's own location.*

1D Fulton, Patsy J. Chapter 9: "Time and Stress Management." Office Procedures and Technology for College. 10th ed. Cincinnati: South-Western, 1993: 235-257, and Manual (same): 79-80.

A chapter with unusually complete and useful study aids presents information about managing time and stress. The Guide asks students to read flexibly in light of their familiarity with the subject matter and a purpose for reading that includes both instructional and personal goals. The author's suggested answers to review questions are included to help students assess their responses.

Level 2: Office Technology Workers

2A Bell, Arthur H. Chapter 20: "Communication for Intercultural Business." Business Communication: Toward 2000. Cincinnati: South-Western, 1992: 450-478, and Instructor's Resource Guide prepared by Dayle M. Smith. (same): 242, 244-245.

A twenty-eight page chapter on intercultural sensitivity is presented for study, using questions and quizzes from the Instructor's Guide to focus reading. Students practice note-making on the section entitled, "Eleven Common Areas of Cultural Misunderstanding." Six exam questions are included.

2B Curtain, Marlene. "Expediting Treaties and Hostage Releases: It's All in A Day's Work for the Foreign Service Secretary." The Secretary. May 1992: 8-10.

This article presents an exotic picture of secretarial work in the Foreign Service. Pictures show the author's exciting work locations, while the article details the traditional and non-traditional roles she played in various posts. Students write three essay questions which might be asked on a test over the article, then analyze what makes a good essay question.

2C1 Billard, Mary. "Do Women Make Better Managers?" Working Woman. March 1992: 68-71, 106-107.

2C2 Froiland, Paul. "Pride and Prejudice." Via FedEx. Fall 1992: 18-19.

The Billard article takes on the question of whether women have a unique and more effective managerial style while Froiland presents male secretaries' reactions to stereotypes. In both articles, questions of gender bias are raised. Students are encouraged to be aware of their own attitudes towards women as managers and men as secretaries while reading to determine the authors' opinions. After working through both articles, students are asked to respond to a classmate's highly biased reaction to both articles.

Level 3: Ergonomics in Office Technology

3A Joyce, Marilyn and Ulrika Wallersteiner. Part 3:"Ergonomics in the Workplace." Ergonomics: Humanizing the Automated Office. Cincinnati: South-Western, 1989: 82-99.

The chapter presents information which would be included on a test but could also make a difference in the comfort of the reader. A ten-item test is included as a guide to study effectiveness.

3B Dainoff, Marilyn and Marvin Dainoff. "Guerilla Ergonomics." WordPerfect The Magazine. May 1992: 42-45.

The article presents low-cost suggestions for achieving the same goals outlined in the Joyce and Wallersteiner text chapter, "Ergonomics in the Workplace." Designed to be assigned only after the text chapter in **3A** *has been read, the concluding exercise presents an essay question requiring a comparison between the text and article. The Answer Key includes a student essay which has been marked and graded by an instructor.*

Student Reading Inventory

Name _____

Date _____

Course _____

❑ **Presurvey**

❑ **Postsurvey**

To the student: Please use this form to discover how you usually tackle a reading assignment. There aren't any right or wrong answers. Just circle the number that is closest to what you actually do. Thanks!

	Almost Never		Sometimes		Almost Always
1. Before reading, I check to see					
• how hard the reading will be	1	2	3	4	5
• how much I know about the topic	1	2	3	4	5
• how long the selection is	1	2	3	4	5
• which parts of the chapter contain the information I need	1	2	3	4	5
• how the material is organized	1	2	3	4	5
• if I know most of the words	1	2	3	4	5
2. During reading, I check to see					
• if I understand each paragraph before going to the next one	1	2	3	4	5
• whether each idea relates to a course objective	1	2	3	4	5
• if I'm really paying attention as I read	1	2	3	4	5
• if my mind is wandering, and if it is, I take steps to get back on track	1	2	3	4	5
3. After reading, I check to see					
• if I have found information or answers that match the course objectives	1	2	3	4	5
• which material should be underlined or included in marginal notes	1	2	3	4	5
• how much of the material I have understood by testing myself	1	2	3	4	5

Instructor Feedback Form

This form can be used for any of the **Learning to Read Technical Publications**. Please copy this form and complete one for each title you would like to evaluate. This form is for:

❑ **Automotive**	❑ **Child Development**	❑ **Computer Technology**
❑ **Fashion Merchandising**	❑ **Nursing**	❑ **Office Technology**

Please read each statement below and circle the number corresponding to the response which best matches your reaction. Your choices are:

1. No improvement needed — Excellent materials. These work for me!
2. Little improvement needed — Quality materials. I can use these effectively in class with only a little modification or adaptation.
3. Improvement needed — Materials need revision.
4. NA — Not applicable or appropriate for my students.

These reading materials:	Improvement Not Needed	Little Needed	Revision Needed	NA
• cover a range of interesting topics relevant to the technical field.	1	2	3	4
• present current ideas/concepts from the technical field.	1	2	3	4
• emphasize the most significant issues in the technical field.	1	2	3	4
• are suitable for use with the students in my classes.	1	2	3	4
• are presented at appropriate levels of difficulty.	1	2	3	4
• are accompanied by appropriate and useful pre-reading activities (to activate prior knowledge and establish a purpose for reading).	1	2	3	4
• are accompanied by appropriate and useful during-reading activities (comprehension monitoring, look-backs, cues awareness, etc.).	1	2	3	4
• are accompanied by appropriate and useful post-reading activities (highlighting key ideas, summarizing ideas, clarifying ideas with examples, providing practice for learning materials, etc.).	1	2	3	4
• readily allow for the teaching of multiple learning strategies.	1	2	3	4
• include appropriate and useful notes to the *Instructor* for using the materials.	1	2	3	4
• include appropriate and useful notes to the *Student* for using the materials.	1	2	3	4
• can be used to foster independent reading skills as students acquire strategies to use on their own without explicit instruction.	1	2	3	4

- What is your overall rating of the materials?

  ☐ Excellent ☐ Good ☐ Satisfactory ☐ Poor ☐ Unsatisfactory

- Why did you rate the materials as highly as you did?

- What kept you from rating the materials more highly?

- Please feel free to make comments below. Thank you for your assistance.

Optional:

Name: _____

College: _____

Address: _____

_____

_____

Phone No: (Work) _____

(Home) _____

Return to:

Linda Lee
Brookhaven College
3939 Valley View Lane
Farmers Branch, Texas 75244-4997

Adapted with permission from a questionnaire developed by Dr. Gail Platt, South Plains College

The Workplace of the Future

Purpose for Reading

The office technology field is changing so rapidly that both students and their instructors have to make every effort to keep up. The Secretary is a magazine that professionals in the field look to for information about current practices and trends for the future.

Early in an office technology course, your instructor might ask you to read the following article to get a "general idea" of how secretarial careers will be changing. In order to achieve the instructor's purpose, you'll have to compare what you already know with what the author has to say, looking for main ideas rather than fine details.

Mahaffie, John B. "The Workplace of the Future." The Secretary. June/July 1992: 29-32.

Before Reading

1 Before you even look at the article, you can get ready to read by thinking about the title and subtitle of the article: "The Workplace of the Future: Advancements in Information Technology and Business Practices Will Reshape the Work of Secretaries."

The subtitle suggests that two general types of advancements will be covered: information technology and business practices. Even if you're not sure, make a guess about one or two of the changes to be discussed in each area. Guessing gets you involved, and an involved reader learns more!

Write your guesses about advancements in "information technology" here:

Write your guesses about advancements in "business practices" here:

Before Reading ❷

It's good practice to look over the article to get a general idea of how it's organized, how long it is, and so forth. Spend just a minute or two turning through the article now, and then return to the outline of chapter headings below:

(Introduction)
Technological changes
- The computer
- Communications technology
- Expert systems
- Databases
- Desktop publishing
- Video
- Emerging and new technologies

Changing business practices
- Downsizing and flattening
- New relationships among organizations
- New arrangements with workers
- Competition
- Globalization of the world of business, economy, and society
- Quality, Reliability, and Service (QRS)

Implications for secretaries
Essentials of the new role
New skills in demand
Training for the future
Gearing up for a new role

When you looked through the article, did you pick up these headings?

Did you notice that the differences in type style indicate the level of importance of the heading?

The outline above lists all of the bold headings in the article. It does not include major details contained in bulleted lists such as those under "Emerging and new technologies" and "Training for the future." In this article, the ***italicized bold*** headings are supporting details and the plain **bold** headings are the main ideas.

Before Reading

❸ Compare your guesses in **Before Reading 1** to the items listed in the outline under "Technological changes" and "Changing business practices."

Were you and the author thinking similar thoughts?

If so, you may be ready to read what he has written.

If not, you may need to spend a few more moments looking over the outline above, trying to get a picture of the author's view of the future of the workplace. It's difficult to understand an author's ideas when your thoughts are in a completely different place!

If you have never heard of the concepts in the outline, your background is not what the author expected.

What are some things you can do to get ready to read an article for which you have little background?

During Reading

As you read this article, keep in mind that your instructor assigned it so you'd have a general idea of changes in the field. Depending on your own background, that may be very easy or more challenging.

In any case, the assignment to read for a "general idea" should permit you to read for main ideas without worrying about remembering all the supporting details.

After Reading ❶

Since your purpose was to read for "general" (main) ideas, don't try to remember all the details the author used to keep you interested. Focus instead on the author's point in each of the major sections of his writing.

Write a sentence that summarizes what the author is saying about these topics:

Hint: Try writing your sentences without looking back at the article; you may remember more than you first think. If keeping headings 2-7 mentally separate seems very difficult, write two or three sentences summarizing the author's overall ideas from those six sections.

1. Technological changes:

2. Changing business practices:

3. Implications for secretaries:

4. Essentials for the new role:

5. New skills in demand:

6. Training for the future:

7. Gearing up for a new role:

After you've done your best, look back at the article to evaluate each of your sentences. If you want to make changes, do so!

When you're satisfied with your responses, check with the **Answer Key**.

After Reading

❷ Did you see some new vocabulary while reading? If not, you must already know (or have skipped over) these words:

unprecedented

synergy

burgeoning

plethora

Take a minute to look back through the article, looking for words or ideas which are worth some extra study. Look them up in a dictionary and make a note to ask for additional information, if you're interested.

The Workplace of the Future

Mahaffie, John B. "The Workplace of the Future."
The Secretary. June/July 1992: 29-32.

Reprinted with permission
from the June/July 1992 issue of
The Secretary. Copyrighted 1992
Professional Secretaries International.

For permission to reprint
for classroom use,
contact:
Ms. Eileen Warren
The Secretary
2800 Shirlington Road, Suite 706
Arlington, VA 22206
Phone: (703) 998-2534; FAX (703) 379-4561

50 Years of Progress

THE WORKPLACE OF THE FUTURE

Advancements in information technology and business practices will reshape the work of secretaries.

BY JOHN B. MAHAFFIE

Sweeping change in the world of work is reshaping the responsibilities of secretaries. As we look a decade down the road to 2002, we can see changes in business and technology fundamentally altering the role of secretaries. Many of these changes are already underway.

These changes offer secretaries an unprecedented opportunity to take the initiative to redefine their positions, which will require new combinations of skills. The foremost opportunity for secretaries is the role of information manager.

Illustration by Janine Orr

The key forces and factors shaping the future for secretaries over the next 10 years fall under two categories: technological change and change in business practices.

Technological changes

Technology changes the way work is done. Information technologies, in particular, will reshape the work of secretaries. This is a positive trend, not a threat, as long as secretaries redefine their roles in the workplace. Technology can free secretaries from more tedious work and enhance their role as a central resource in the organization.

The computer. Personal computers and workstations will be on nearly every desk by 2002. They will bring power and resources to the fingertips of every worker. Secretaries have already begun to lose their monopoly on the keyboard.

Every professional in the workplace will be computer literate. Baby boomers, those aged 28 to 46 today, are moving up the organizational ranks; most know how to use personal computers.

By 2002, few computer illiterate workers will remain at work. Most workers will write many or all of their documents at the PC or workstation. They will not all, however, have complete command of the information technology at their fingertips. Secretaries will work alongside other workers to bridge gaps in knowledge and experience. They will still work with documents to refine and edit them into publishable shape.

Information management is essential to today's businesses and will grow in importance over the next 10 years. Secretaries can command that flow, ensuring that the right people get the right information.

Communications technology. Technologies, especially fiber optics and satellite communications, are fast creating national and international communications networks. These will connect people to other people, as well as to libraries of data and documents, machines, appliances, and so forth. No matter where people are, they will be in touch thanks to the technologies of fax, voice mail, electronic mail, video conferencing, and portable and mobile cellular phones.

Secretaries in the future may work to ensure the efficient flow of information through these technologies to dispersed workers. Awareness of new technologies and how they work will be especially important.

Expert systems. Expert systems are computer software systems that integrate the knowledge of real experts and simulate human decision making. Expert systems and other information tools give access to expertise, but will not replace experience-based knowledge. They will be able to capture some of the experience of professionals, to make decisions, and give advice. These technologies could take some work away from secretaries, but will become tools of secretarial work as well.

Databases. On-line, continuously updated databases, and increased use of optical disk storage of libraries of information will make unprecedented amounts of information available. The selection of information and customization of its format, printed or electronic, will be increasingly important workplace tasks.

Desktop publishing. Publication quality documents, including ones with graphics, pictures, and multi-color printing, will be achievable with desktop equipment. Desktop publishing will be more common, and will be an opportunity for secretaries to apply and expand their skills.

Video. Video will increasingly be a part of the work world. Organizations will use it for training, as archives of important meetings, and as forms of information delivery. Interactive video technology is emerging as an important tool of business, particularly for training. In some organizations, videos may become common standard ways of conveying information. Secretaries may handle video equipment, and possibly edit videos.

Emerging and new technologies. Altogether new technologies that will reshape secretarial work include:

- "Wizard" technologies—devices that serve as portable electronic personal aides—will allow workers to transport network, fax, PC, and cellular communications.
- Automatic (computer) transcription from dictation using voice recognition. This technology will probably be in development in 2002. Vocabularies will still be limited and transcription may be perhaps only 75 percent accurate. However, the technology may be usable in combination with a secretary's skills to speed document preparation.
- Computer language translation of text in which the computer can manage about 90 percent of written language translation, with human translators completing and making improvements to the translation.
- Automated and increasingly sophisticated document retrieval from vast libraries of information, inside and outside the organization, will be possible. We will gain more and more worldwide access to information and it will be available in several forms including text, graphics, pictures, video, and sound.
- Hypertext systems—information databases that allow browsing, text searching, and the inter-linking of information in new ways.
- Personal communicator—a portable device through which people will be reachable from one number, no matter where they travel.
- Online, automated travel planning and ticketing and banking transactions.

n Electronic data interchange (EDI)—The direct exchange of electronic data from company to company and database to database. EDI will grow in use and sophistication. Already, computers transmit invoices, orders, bills of lading, and other routine paperwork to other computers without human intervention.

Changing business practices

Every business is in the information business. Organizations that will prosper in the next century will be those fully information-integrated. They will restructure themselves with that in mind. At the same time, pressure of competition, cost cutting, and other forces are influencing the restructuring of businesses.

Downsizing and flattening. Fewer layers of hierarchy and reduced middle manage-

ment ranks are changing the flow of information inside businesses. Bosses will have greater spans of authority and, by implication, secretaries will work with a greater span of people.

New relationships among organizations. Nontraditional businesses will become common in the next decade. They will make efficient business communication even more critical. The changes include joint ventures and alliances, either temporary or permanent; outsourcing; and mergers and acquisitions. Spinning off parts of companies is common as well. These trends increase the complexity of business communication and raise the stakes for efficient information management.

New arrangements with workers. The traditional employer/employee relationship will change for workers as new arrangements evolve. Work at home may become increasingly possible for secretaries as technologies arrive that make where you do your work less important. The boss may be at home or on the road as well. Technologies at play will include call forwarding; video conferencing; electronic preparation, storage, and transfer of documents; fax; universality of overnight delivery services; and technology to jointly edit documents with people in scattered locations.

Businesses will use more short-term workers. Permanent employees will be valuable for their memory and experience, and for formally and informally training temporary workers.

Competition. Competitive pressures are already forcing businesses to reduce spending and struggle to raise productivity and cut costs.

Globalization of the world of business, economy, and society. With more international contacts, some secretaries will become diplomats, linguists, and students of culture.

Quality, Reliability, and Service (QRS). Central to business competitiveness today and over the next decade are quality, reliability, and service. This is most easily seen in manufacturing, but its importance is equal in the service sector of the economy. The QRS challenge includes every business.

Implications for secretaries

Organizations are restructuring themselves to integrate new technologies and new work relationships and practices. A key aspect of this is the integration of information into every aspect of a business. These changes make information central to the future of secretaries. People who manage information have a vital role, and even a power base, in the organization of the future.

Secretaries have an opportunity to be at the center of the information flow in business. Armed with organizational and administrative skills, and the tools of information technology, they can become the organization's experts in how to access, file, store, process, and send every type of information.

This is the traditional role of the professional secretary, enhanced and expanded by computers and other information technologies. Secretaries need to think about the changing structure of the organization systematically to find how it will affect their work.

Essentials of the new role

The work secretaries have done historically will be broken into its parts and resorted. For example, telephone answering and message taking are being taken over by voice mail. Organizations will continue to give some work to centralized typing services. Secretaries will retain the tasks of document formatting, editing, and related graphic design.

Some secretaries will work closely with one boss. Others will work alongside a team of other professionals. There is great synergy in melding the organizational skills and knowledge of a secretary with whatever skills other professionals bring to bear in their work. The team concept will continue to be valid.

Information management is essential to today's businesses and will grow in importance over the next 10 years. Secretaries can command that flow, ensuring that the right people get the right information. They can take on the task of ensuring that information is in the correct format, electronic or otherwise, and that it is routed to the right places.

New skills in demand

Secretaries in 2002 will need a wide range of skills. It is likely that they will be even more valued than they are today, and compensated for it, if they redefine their role.

Computer literacy. This skill goes beyond the use of PCs for word processing, spread-

What Do You Like Best About Being A Secretary?

"I like the challenge. I like being a part of the management team. I'm in the engineering department, where we design the product we make and I like being involved in the first steps of the product's (development)."

—Sandra Martin CPS, senior engineering department secretary, Alcon Surgical, Huntington, West Virginia

"I like the variety of duties—you don't get bored from doing the same thing over and over again."

— Doris McCullar, secretary to the controller, Delta International Machinery Corp., Tupelo, Mississippi

"The best thing about being a secretary is that it allows me to be involved at the decision-making level—where the action is."

— Veronica Stoute CAM/CPS, executive assistant, Committee on Community, Race and Ethnic Relations, City of North York, Ontario, Canada

Study in new subject areas will help prepare secretaries for the workplace of the future.

sheets, and so forth. It includes sophisticated graphics skills, desktop publishing, online data and document retrieval, electronic mail, and understanding of computer networks.

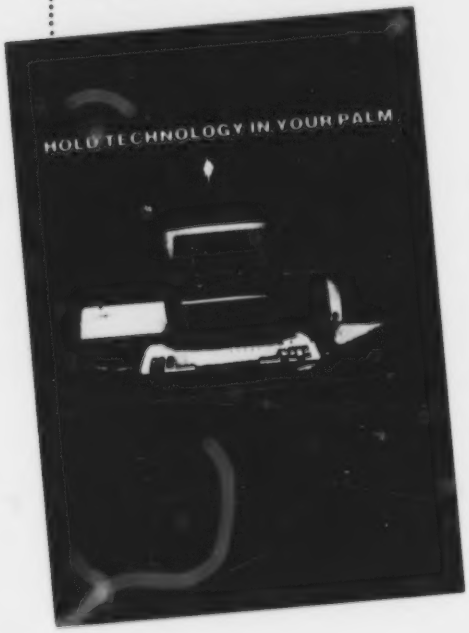
For some secretaries, computer literacy will require becoming adept at installation and customization of software or hardware tinkering and repair. For many more, it will mean acquiring an understanding of computer operating systems and sophisticated macro creation. The secretary has the opportunity to be a technological nerd, a virus policeman, or data rescuer.

Ability to organize. The mainstay of the secretary's arsenal of skills, this will remain central to their work in 2002.

Teaching and training the staff on how to use new technologies and software.

Video and teleconferencing knowledge—especially in setting up communications and overseeing the technical arrangements involved. *Graphic arts skills*—especially those associated with desktop publishing and also for interactive software and video.

English and other language skills—to continue the secretary's traditional work of editing and improving text. More people in organizations will be creating documents and may need help in polishing them.



Training for the future

Study in new subject areas will help prepare secretaries for the workplace of the future. The preparation can be formal or informal. Useful courses of study for secretarial students and possibilities for continuing education for the working secretary include:

- Computer use, including the principles of computing, programming, and even repair.
- Art and graphic design, especially to enhance skills in desktop publishing and graphic presentations.
- Video and video editing.
- English writing and editing, for improving written communications in the organization.
- Foreign languages, for those working with overseas counterparts, foreign visitors, and people from different ethnic backgrounds.
- Business accounting and bookkeeping. As much of these tasks are computerized, the secretary can become the human interface between the staff and bookkeeping functions.
- Library science. With the burgeoning use of electronic databases and other information sources, expertise in information access and knowledge of specific information sources will become increasingly important.
- Information systems science. Database creation and use is also part of the work of increasing numbers of organizations as everything is systematized, quantified, and digitized.

Gearing up for a new role

The new roles looming on the horizon for secretaries may mean the profession will never again be as clearly defined. Evidence of this trend includes the plethora of job titles from administrative assistant to office manager to clerk typist.

Management of information is both the key role and opportunity. Information collection, analysis, management filing (electronic), and sophisticated retrieval can become the secretary's specialization.

People skills, however, will remain a critical strength of secretaries. Technology will not replace those skills, which will continue to enhance the efficiency of information flow.

John B. Mahaffie is an associate with Coates & Jarratt, Inc., a firm in Washington, D.C. that specializes in futures research and policy analysis.

The Workplace of the Future

Before Reading ❶

Your guesses are as good as anybody's! Don't worry about being "right" at this stage. Just let your imagination go! If the ideas of "information technology" and "business practices" mean nothing to you, maybe looking up **technology** and **practices** in the dictionary will give you a hint. If what you find in the dictionary doesn't help much, use context to help you as you read—and consider getting a newer dictionary!

Before Reading ❷

There are lots of ways to get on the same track as the author. One way is to look more closely at the article, noting particularly the graphics and visuals:

In this case, the picture on the first page shows a computer screen with a scary message for "computer illiterates." The paragraph in the margin of the next page is encouraging, suggesting that secretaries can "command the flow" of essential information. The next page personalizes the article with quotes from three different people. Do you respond to their sense of challenge, variety, and involvement?

In addition to the encouraging picture and words, the last page offers information about the author of this article. Does it surprise you to learn that he is not a secretary but a specialist in futures research?

After Reading ❶

See if your sentences are similar to these. The words in parenthesis are major details which you may or may not have included.

1. **Technological changes**: In ten years, almost every worker will have a PC which will use a variety of information technologies (such as networks, expert systems, on-line databases, desktop publishing, video, and many new technologies).

2. **Changing business practices**: Businesses will restructure (to produce smaller, "flatter" companies which relate in non-traditional ways to other businesses and their own employees); competition in a global economy will make concern for QRS (quality, reliability, and service) a major challenge.

3. **Implications for secretaries**: The changes in organizations include integration of information, so the role of the secretary—who is the center of the information flow—must be affected.

4. **Essentials of the new role**: Whether working with one boss or with a team, secretaries will be in a position to manage the essential flow of information.

5. **New skills in demand**: In the next ten years, a secretary will need advanced computer skills as well as abilities in organizing, training, video and graphic skills, and text editing (perhaps in more than one language).

6. **Training for the future**: Training related to the above skills will be important, as well as in specialties (such as computer-based accounting, and library and information systems science).

7. **Gearing up for a new role**: The job of secretary as an information manager is growing and expanding with technology, but the need for interpersonal skills will always remain.

How did you do? Did you get main ideas? Did you get at least some of the major details, such as those in parenthesis? If not, you may not be expecting enough of yourself!

In a well-written article such as this, there is not a lot of filler which you can ignore, even if getting only main ideas was your purpose. For example, in the "New skills in demand" section, it's not enough to remember that "some new skills will be in demand." You'll need to hold yourself responsible for at least three of the four skills listed, in addition to the essential "advanced computer skills."

After Reading ❷

Are you going crazy trying to find those four words? They're really there!

Unprecedented is on page 1A-8 in the second paragraph: "These changes offer secretaries an unprecedented opportunity . . ."

Synergy is on page 1A-10 in the section on "Essentials of the new role," in the second paragraph: "There is great synergy in melding the organizational skills and knowledge of a secretary with whatever skills other professionals bring to their work."

Burgeoning is on page 1A-11 in the "Training for the future" section under Library Science: "With the burgeoning use of electronic databases . . ."

Plethora is on page 1A-11 in the first paragraph of the "Gearing up for a new role" section: "Evidence of this trend includes the plethora of job titles . . ."

Since they're in an assigned article, it's likely that the instructor has seen these words and may use them in class. They're probably worth your time.

Communication: Visual and Verbal

Purpose for Reading

"Communication: Visual and Verbal" is the second chapter in a textbook used in a course on desktop publishing. It would be assigned early in the course to introduce general concepts that would be explored in greater detail during the rest of the course. As is typical in introductions, new terminology is explained. In this chapter, the terminology will be both verbal (words) and visual (graphic information), so plan to give yourself enough time to absorb new information from both sources.

Early in a course, before you've had an exam, you may not have a really clear idea about what your instructor emphasizes in a course. Thus, you will probably have to rely on the textbook's clues to what is important. In working with this chapter, you'll be using the study aids provided by the author and editor to guide and check your understanding.

Busche, Don and Bernice T. Glenn. Chapter 2: "Communication: Visual and Verbal." The Desktop Design Workbook. Englewood Cliffs, NJ: Regents/Prentice Hall, 1992: 21-36.

Before Reading

1 In most textbooks these days, the author tries to make the ideas as clear as possible by using a variety of study aids. Since this is a chapter on visual as well as verbal communication, you might expect to find particularly clear graphic clues indicating which ideas are important and what to remember.

Look through the chapter to see what study aids are available, and—at the same time—to get an idea of what topics the authors included in Chapter 2, "Communication: Visual and Verbal."

Put a check mark beside the features you find:

- ☐ Chapter objectives
- ☐ Pictures
- ☐ Charts
- ☐ Headings and subheadings
- ☐ Questions for reviewing the chapter's content
- ☐ Activities related to the chapter's content

How does the chapter look to you? Attractive? Interesting? Easy?

Before Reading ❷

Figuring out the visual clues is an important step in using textbook study aids. You'll need to look carefully at the chapter to see which headings are most important and which introduce details and supporting ideas.

The list below includes all the headings and subheadings in this chapter.

Use the visual clues provided in the chapter to label the most important headings with a "1."

Label headings with a "2" if they are of medium importance, as indicated by the graphics.

The subheadings which seem to be details or subordinate concepts get a "3."

Hint: Look at the chapter—don't try to do this from memory. There are only four headings which deserve a "1."

1, 2, or 3?

- ☐ The Way Things Look Is a Form of Communication
- ☐ Comparing Elements in Speech and in Print
- ☐ Comparisons Between Speech and Publication Elements
- ☐ Basic Requirements for Desktop Publishing Text
- ☐ Visual Communication
- ☐ Characteristics of Visual Messages
- ☐ Representation of Visual Elements
- ☐ Rules for Visual Communication
- ☐ Rules by Convention
- ☐ Rules Derived from Contexts and Settings
- ☐ Rules by How Our Minds Organize Information
- ☐ Design as a Skill
- ☐ How to Solve Problems with Design
- ☐ Define Your Audience and Its Environment
- ☐ Know the Purpose of Your Publication
- ☐ Know How You Want Your Audience to React
- ☐ Know the Image You Want to Project
- ☐ Design Aesthetics and Visual Communication
- ☐ Form and Content

Continued on following page.

- ☐ Structure and Space
- ☐ Mood and Feeling
- ☐ Text and Visual Communication
- ☐ Legibility
- ☐ Readability
- ☐ Consistency
- ☐ Relevance

Before Reading ❸

Now that you've looked carefully at the headings and subheadings in the chapter, try to predict where you'll find coverage of each one of the chapter objectives. In this chapter the chapter objectives are listed at the first and expressed as outcomes: "When you finish this chapter you should be able to:"

Hint: You are only "predicting" (guessing). You don't need to read the information yet, just write down which headings *seem* to relate to each of the objectives.

1. The first objective is "Discuss how visual language can be used as a communication medium." Which of the headings and subheadings seem to be related to that objective?

2. Which headings and subheadings seem to cover "Summarize the basic requirements for desktop publishing text"?

3. Where will you find the information for "Describe how graphic design and aesthetics aid in the communication process"? (If you've been hoping this word "aesthetics" would disappear, you're sunk. Unknown words in headings have to be looked up *before reading*! Do it now, if you don't feel confident of the definition.)

4. List the headings which relate to "Define communication problems and discuss how visual communications can help solve these problems."

5. Which parts of the chapter will provide the information necessary to "Identify basic visual communication principles and explain how they aid in the design of aesthetically pleasing publications"?

Before Reading

❹ One final study aid deserves your attention before you start reading. Looking at the review questions *before reading* can really improve your understanding of the author's ideas. In this textbook, they're called "Checking Your Understanding" and they're located on page 1B-26.

Read through all ten questions carefully. Think about where you'll probably find the answers. If you need to, look at the outline of the chapter you made when you answered **Before Reading 2**.

During Reading

When you know what the author and editor think are the important concepts in this chapter and you have thought about your own attitudes and knowledge about the topic, you are prepared to read.

Keep in mind the five objectives and the ten "Checking Your Understanding" questions as you read. Make a mental note each time you find an answer. Look back at the objectives and questions as frequently as you like to make sure you are getting useful information while you read.

If you come across an unfamiliar term, mark it and then try to read to the end of the paragraph or section before interrupting your reading for a trip to the dictionary. If you have to look up the word in order to understand the section, go ahead and use the dictionary. Otherwise, plan to use the dictionary after reading, looking up all the words you marked at one time.

You may want to break your reading into several sessions. Since there are four major sections in this chapter, you might plan to read only one or two sections at a time. At the end of each session, plan to make notes covering what you've read.

After Reading

❶ Your main task after reading is to "save" the ideas you comprehended during reading so that you can review and reflect on the material. After you have finished reading and making notes on the final section of the chapter, take a few minutes to review all your notes in order to get the whole chapter back in mind.

Another technique for saving your mental work is to write out answers to chapter objectives and review questions. Doing so also gives you one more opportunity to think about the material. If you discover questions you can't answer even after you do some re-reading, you know you have something important to ask your instructor!

Answer the following questions that are based on the textbook's review questions. Respond to each question from memory first, then look back in the chapter to correct and add to your answer.

1. Summarize the basic requirements of writing text for desktop publication. Include at least five of the ten listed requirements.

2. List and define the four problem areas that must be addressed before beginning a publication design.

Continued on following page.

3. Explain the function of these aesthetic elements in visual communications: form, structure, space, and mood.

4. Define and explain the differences between each element of the text/type communication quartet: readability, legibility, consistency, and relevance.

After Reading ❷

Now's the time to look up words which, though unfamiliar, didn't require you to stop reading and dive for the dictionary.

Did you notice **ephemeral** on page 1B-13 and in Table 2.2 on page 1B-19? There is a definition in context, but you might want to know more!

What other words do you need to look up?

After Reading ❸

The first major exam in your desktop publishing course would probably contain several items from this introductory chapter. Your assignment was to get a "general introduction," so you shouldn't worry about memorizing small details.

To give you some idea of how effective your learning has been, the following test items have been developed. Look over any notes you made on the chapter and your answers to the review questions before peeking at the questions. When you feel you are well-prepared for a test, answer the questions on the following page.

Chapter 2:
"Communication: Visual and Verbal"
EXAM QUESTIONS

1. Authors who write material for desktop publishing should

   A. write clearly, simply, and briefly.
   B. use concrete language, free from jargon and sex bias.
   C. avoid the first person (I) in their writing.
   D. all of the above
   E. A and B only

2. The ad which featured a jogger in Los Angeles and a businessman in a suit in New York

   A. showed awareness of audience and context.
   B. projected a bad image of Los Angeles.
   C. was designed to inform readers about regional differences.
   D. was grave and serious in tone.

3. Form, structure, space, and mood are

   A. important aspects of verbal communications.
   B. architectural elements relevant to design.
   C. of concern only to art critics or beauty consultants.
   D. elements of aesthetics in design.

4. A publication printed so that the text is smeared and blurry presents the reader with problems in

   A. readability.
   B. legibility.
   C. consistency.
   D. relevance.

Communication: Visual and Verbal

Busche, Don and Bernice T. Glenn.
Chapter 2: "Communication: Visual and Verbal."
The Desktop Design Workbook.
Englewood Cliffs, NJ:
Regents/Prentice Hall, 1992: 21-36.

Reprinted with permission
from Regents/Prentice Hall.

For permission to reprint
for classroom use,
contact:
Ms. Nancy Brussolo
Regents/Prentice Hall
113 Sylvan
Englewood Cliffs, NJ 07632
Phone: (201) 592-2425

2. COMMUNICATION: VISUAL AND VERBAL

When you finish this chapter you should be able to:

- *Discuss how visual language can be used as a communication medium.*
- *Summarize the basic requirements for desktop publishing text.*
- *Describe how graphic design and aesthetics aid in the communication process.*
- *Define communication problems and discuss how visual communications can help solve these problems.*
- *Identify basic visual communication principles and explain how they aid in the design of aesthetically pleasing publications.*

DESKTOP PUBLISHING IS A form of communication, not only in the verbal content of its message, but also in the visual signals a message sends to the reader. Communication exists on many levels, and messages are sent in many forms. Animals communicate with howls, grunts, or birdsong. Humans read facial expressions and body language along with listening to words. People also communicate using messages in the form of pictures or images. Red and green lights, when used as traffic signals, are visual messages that tell a driver when to stop and go on the road. Red and green signs in December let us know that it's time to do Christmas shopping. Apart from color, messages can be sent through texture, size, or spatial arrangements (in a room, on a page, or in the outdoor environment). Visual messages are common in our everyday lives.

THE WAY THINGS LOOK IS A FORM OF COMMUNICATION

Speech is one of our most basic forms of communication. It is fluid and expressive. We punctuate our utterances by speaking soft or loudly and varying the pitch to make it higher or lower. Ending a sentence by going up in tone usually signifies a question. The message is made more emphatic when it is coupled

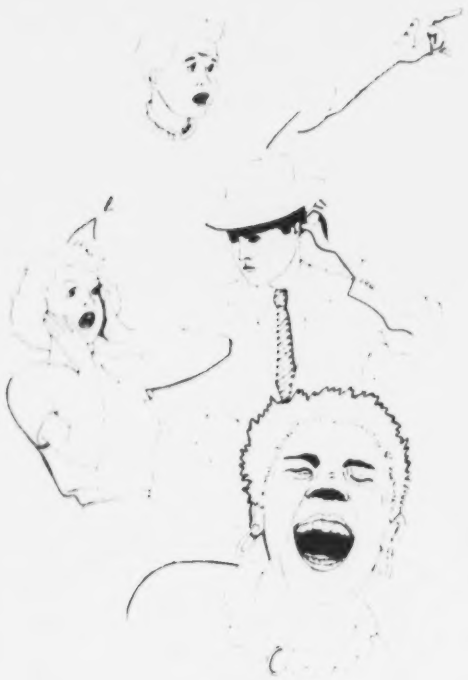


Figure 2.1: Examples of body language, facial expression, and gesture (courtesy Sue Linville.)

COMPARISONS BETWEEN SPEECH AND PUBLICATION ELEMENTS

Verbal Format Elements	Publication Format Elements
The conversation opener	Title
Individual topics and events, with opening announcements for each	Stories and individual sections of a publication
Small talk -- actual contents of each event	Contents of a story or article
Audible emphasis punctuating speech	Subheadings used as visual punctuation
Gestures	Graphical images
Silences	White space such as margins and paragraph space markers

Table 2.1

with a visual gesture such as raising the eyebrows. The sound and expression of spoken exchange coupled with bodily accents is part of what we respond to when we talk to each other, as illustrated in Figure 2.1.

Speech is ephemeral. The sounds of the spoken word disappear unless they are recorded. According to Marshall McLuhan[1], before printing became widespread, the communication of a message was based on word inflection, using audible sound cadences for meaning. As printed communication became more widespread, the order of words in a visually presented text message replaced sound as a communicant. Grammar and rules for the written word replaced the rhetoric used in a vocal expression. The written word can be thought of as a kind of frozen speech, a permanent record when compared to verbal dialogue.

Apart from the messages in text as written language, the printed word can use visual messages to express moods and feelings. This chapter will introduce you to ways in which sounds, gestures, and the body language of human communication can be represented in the printed pages you produce.

COMPARING ELEMENTS IN SPEECH AND IN PRINT

Elements in a publication are similar to those used in verbal communication, as seen summarized in Table 2.1. When people start a new topic of conversation, they usually use some *opening phrase* to introduce it. In text, the *title* functions similarly. Conversation may consist of many different topics and events, with opening announcements for each. This equates to the individual stories and sections of a publication. After a topic is introduced, the conversation that follows consists of small talk, equivalent to the actual contents of a story or article. Vocal emphasis punctuating a conversation is like the use of headings, while the use of gestures corresponds to graphical images — their size, color, and texture. Silences in verbal communication are similar to the white spaces on a printed page.

COMPARISONS BETWEEN SPEECH AND PUBLICATION ELEMENTS

Imbedded in any publication are many different kinds of messages. The text containing the content of the written message is the most obvious. All publications also embody subliminal messages that are expressed visually. Non-textual messages in a publication are called its *visual language*.

Examples of visual language used in communication are illustrated in Figure 2.2. The typeface you use; the way you arrange the text on the page; the number, size, and kind of illustrations you use; and the quality, color, and size of paper all work together to form a setting. This setting acts as a visual frame for the messages in your publication, and becomes part of the total message to be received by your reader audience.

To learn more about how to translate speech elements into those used in publications, read Chapter 3, *Document Structure: Organizing Your Publication.* It discusses the parts of a publication and shows you how to work with them as a desktop designer.

Powerful
Professional
Jazzy
Stylish
Playful
Distinguished

Figure 2.2

BASIC REQUIREMENTS FOR DESKTOP PUBLISHING TEXT

This book is not intended to cover the writing aspect of desktop publishing. However, the checklist illustrated in Figure 2.3 summarizes some of the basic requirements for an author to follow when producing desktop publishing text. If you need more help when writing material for your publications, consult your local library.

When you are preparing to design a booklet, newsletter, or report, keep the following in mind:

Only part of the message carried by your publication is expressed through the printed words. Another part of the message is sent through the appearance of your publication.

✔ **CHECKLIST FOR TEXT:**

The text:

- ☐ Is written clearly, simply, and as briefly as possible.
- ☐ Contains short, concise sentences.
- ☐ Uses concrete language and avoids abstractions.
- ☐ Sounds as if I am speaking.
- ☐ Is free of jargon.
- ☐ Is logically presented; each sentence and paragraph flow meaningfully to the next.
- ☐ Is consistent.
- ☐ Uses active verb forms.
- ☐ Avoids sex bias language.
- ☐ Has been proofread, edited, and rewritten so as to present the message I wish to convey.

Figure 2.3

Figure 2.4: The transportation network is an example of how we use our visual sense in daily life.

Communication through appearance is called *visual communication.*

VISUAL COMMUNICATION

Studies have shown that as much as 80 per cent of what we perceive in the world around us is through our visual sense. Unconsciously, our visual sense guides us to "read" more than the words on a page (see Figure 2.4.)

We read not just words and their meaning, but also how the words are arranged, where they are placed, and what they look like.

Receivers of messages classify them based on what they see. Supposedly, you can't judge a book by its cover, but the person who pulls a book off a shelf and opens it is responding to a message that the publisher makes about the content of the book (see Figure 2.5.)

Visual language can send a reader messages that help organize and clarify the text. It acts as an aide to better understanding by reflecting the information structure of the text. Messages contained in the text of a pub-

Figure 2.5: The visual language that is inherent in the design of the cover of a book may or may not reflect the message within its interior.

lication can be changed based on the way the reader perceives those messages visually. Visual communications reflect the mood of the text message, whether it is serious or humorous, elegant or unpolished.

CHARACTERISTICS OF VISUAL MESSAGES

So far we have discussed visual language in comparison to speech. Visual messages have other characteristics that contribute to their impact. Figure 2.6 illustrates the composite nature of communication. It shows the publication as a composite message, sent by the publication designer and editor, to be received by the reader audience. The medium that carries the communication is print. The message itself is made up of its text messages and its visual elements set within the context of the publication.

REPRESENTATION OF VISUAL ELEMENTS

Visual elements can be very realistic, as in the letters of the alphabet or in photographs. They can also be very abstract, and presented in symbolic form. Look at the photograph shown in Figure 2.7. Realistically it shows a spider in its web. Imbedded in the image are other messages — for example, the concept of evil and intrigue. These messages are "coded"— they are set in a visual

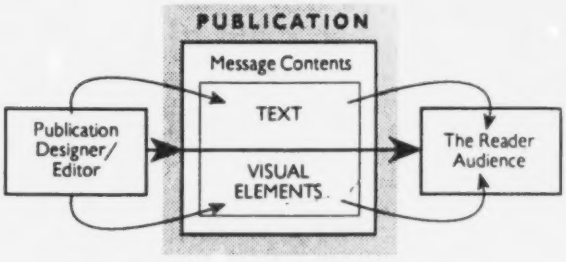


Figure 2.6: The visual presentation in a publication sends messages along with those sent by the words that compose its text.

BEST COPY AVAILABLE

IF MORE DOGS IN L.A.
ATE PURINA HI PRO, IT WOULD
SEEM LIKE THERE WERE
LESS DOGS IN L.A.
IF MORE DOGS IN NEW YORK
ATE PURINA HI PRO, IT WOULD
SEEM LIKE THERE WERE
LESS DOGS IN NEW YORK.
HiPro

Figure 2.8: Two versions of an advertisement for Purina HiPro – the ad at the top was used for a Los Angeles audience, while the one below was aimed at New Yorkers.

shorthand that the mind interprets. Some codes are very personal, but many are universal. These are the ones that graphic designers rely on, according to Paul Rand. "The symbol is . . . the common language between [designer] and spectator . . .The graphic designer's task is to find the essential meaning in the material and then to abstract and symbolize"[7]

RULES FOR VISUAL COMMUNICATION

Rules for visual communication exist by convention, by their context or environmental setting, and by how our minds organize information.

RULES BY CONVENTION

We define some visual arrangements by our cultural expectations, such as reading from left to right in European languages, and right to left in Semitic ones. Arabic numerals and mathematical symbols, too, are symbols that are agreed to conventionally. They usually do not convey information about their numerical value symbolically in their shape. In design, it is important to pay attention to the way people *expect* certain kinds of messages to be sent. Otherwise you will not be understood.

RULES DERIVED FROM CONTEXTS AND SETTINGS

The environmental setting and the medium that is used to carry the message affect how it will be received by its audience. A reader has different visual expectations when reading a report in the office than in reading a play program designed by school-age children for their parents. Advertising agencies take advantage of this fact when designing advertisements for people living in different parts of the country. (See Figure 2.8.)

RULES BY HOW OUR MINDS ORGANIZE INFORMATION

The mind organizes the information it receives into mental formats that are quickly processedand acted on. Cognitive psycholo-

BEST COPY AVAILABLE

gists have defined some of the formats that designers have used intuitively when organizing page layouts. See Chapter 4, *Designing Form With Content*, for a discussion on cognitive research and graphic design.

When you learn how to use visual communication in your publications, it will be easier for you to design a document that transmits your messages clearly and explicitly. Visual communication, appropriately used, will help you to communicate with your intended audience more specifically and with greater power.

DESIGN AS A SKILL

Publication design is an ability that can be learned. It is a sophisticated skill, but one which you can develop through practice, like playing the piano or learning how to become a better swimmer. Not everyone will be an Olympic champion in the area of graphic design, but you can learn to improve your designs through repeated effort and practice.

- ✔ Get as much information as you can about the project. Find out why it needs to be done in the first place. Get the budget and schedules, if possible. Ascertain the scope of the project — large or small. Read Chapter 16, *Publication Planning, Budgeting, and Scheduling*, for help in this area.
- ✔ Study the nature of the design problem, now that you have the basic information.
- ✔ Develop several possible solutions in rough form.
- ✔ Review and criticize your solution possibilities.
- ✔ Rework your solutions. Repeat steps 4 and 5 until you (and your clients) are satisfied.
- ✔ Create the final design.

HOW TO SOLVE PROBLEMS WITH DESIGN

The first step when designing a publication is to learn what the problems are and solve them. It will set the direction that guides your graphic design.

You will need to know *who* your audience is, *what* you want to say to them, and *how* you want to frame the message. For example, you may want to present statistics for a financial report so that it is received clearly and without bias. When designing a restaurant menu, you might want to indicate a feeling of elegance about the restaurant's atmosphere, along with information about the food and prices. A newsletter to company employees may need a light touch, as compared to a more serious newsletter sent to stockholders of the same company. A term paper and a business report both need to show the reader that the information is presented effectively and explicitly.

Unless you define the problems your design is meant to solve and use a design that fits those needs, the publication will not communicate your message or serve its purpose—no matter how attractive its design is.

- ✔ *Define your audience.*
- ✔ *Know the purpose of your publication.*
- ✔ *Know how you want your audience to react.*
- ✔ *Know the image you wish to project.*

Use the checklist in Figure 2.9 on the following page to help you define your communication problems so that you can use visual communications as a way of solving the problems. Consciously define the audience, and what your document requires to reach them. Define your content message as well, in relation to how you want it to be received.

PUBLICATION AUDIENCE ANALYSIS CHECKLIST

- Who is your target audience? (check one or more)
  - Corporate department of large firm. Which one? (Finance, Personnel, Marketing, etc.)
  - Small business owners
  - Retail business. Which type? (Hardware store, boutique, etc.)
  - Service business. Which type? (Dry cleaner, beauty salon, desktop publishing service bureau, etc.)
  - Professional. Which profession? (Doctors, attorneys, teachers, etc.)
  - Client or patients
  - Special age group. Which one? (i.e., teenage, senior citizen, young adult, etc.)
- What is your basic message to them?
  - Create a mood. Which one? (Serious, humorous, etc.)
  - Tell a process or idea. Which one?
  - Inform or educate, present a new concept, teach a new skill
  - Other
- How do you want your audience to react?
  - Take an action. What action? (Place an order, return a reply card, make an appointment, request samples, etc.)
  - Make a telephone call or write a letter
  - Buy a product or service
  - Other
- How do your competitors present their messages?
  - Collect samples of their work
  - Analyze their messages
  - Evaluate the effectiveness of their publications
- Notes

Figure 2.9: A full-sized version of the Publication Audience Analysis Checklist can be found in the Workshop/Forms Appendix.

SPEECH AND PUBLICATION MESSAGE FORMATS

Speech Context *(ephemeral and fleeting)*	**Publication Context** *(Frozen and specific)*
Topic of conversation	Function or purpose of publication
Mood or key of the conversation	Mood or key of the pages
Participants in a conversation	Audience for desktop publishing
Message form: spoken	Message form: written
Conversation is two-way most of the time. Rules for interaction depend on the participants and the time allotted: client, boss, child.	Audience to whom message is directed is specific but is one-way only.

Table 2.2

DEFINE YOUR AUDIENCE AND ITS ENVIRONMENT

Publishing can be defined as the act of using written or printed words to make something public or known, that was previously unknown. This definition implies that the publishing process involves the transfer of knowledge from a sender to an audience. The audience for the printed message can vary in size from one person to a hundred or even several thousand. The audience may be a boss, a coworker, an employee, a prospective customer or client, a professor, a friend.

The way the audience will receive the information you are sending in your publication depends on the *form* in which the published message is presented—its *look*. But don't assume that your intended audience will actually *read* your printed message.

You do not have a reader until you have ***involved*** *that person in your message. Defining or identifying your audience helps you choose the techniques that engage readers.*

A good speaker always considers the audience to whom the message is directed. Don't you speak differently to a child than to a grownup? Words said in anger have a different tone than those expressing love. A request for a raise sounds different than a discussion of where to go for dinner. Most of us have learned to change or vary our spoken communication depending on circumstances, on who we are talking to, and what the subject matter is. We have learned to "read the audience." If the listener does not appear to understand, we repeat the message, speak more slowly, or rephrase the information. Sometimes we use gestures to make the message even more clear. (See Table 2.2.)

The printed word can also be modulated and changed in its presentation to depend on who you are reaching, the mood you wish to convey, and how you would like the reader to

BEST COPY AVAILABLE

react. It is important to understand that the extent and manner in which your audience becomes involved is directly connected to the form in which your message is sent.

KNOW THE PURPOSE OF YOUR PUBLICATION

Desktop publishing is used to produce a variety of different publications. These documents fall into one or more of the categories illustrated in Figure 2.10. Identifying the category to which your document belongs can help you develop the right approach for its purpose.

KNOW HOW YOU WANT YOUR AUDIENCE TO REACT

The printed word is a one-way communication. When your printed message is being read, you usually are not present to watch and listen to your reader, filling in with speech when the printed message has not expressed your intentions clearly. The printed message needs to communicate to your audience *directly* as to how you want them to react while they are looking at and reading the text.

One of the most important design objectives is knowing what action you want your reader to take. Among the more common reactions promoted by business publications are: to buy (or sell); to feel good about a company, product, or service; to define and convey information or data; to change an attitude; to agree (or disagree) with a philosophy; and to support a point of view.

KNOW THE IMAGE YOU WANT TO PROJECT

A third important design objective is knowing what image you would like your publication to project. The arrangement of elements on the page and the design elements you select must fit your purpose and audience.

Figure 2.10: Categories of business documents.

If you are preparing the annual report for a Fortune 500 company, your text should be informative and authoritative and your design should project a feeling of prosperity. If, on the other hand, you are designing a business plan, the mood would be bold, energetic, and confident.

Before you begin to design your publication, list the impressions you want to make.

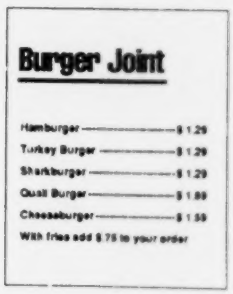
DESIGN AESTHETICS AND VISUAL COMMUNICATION

Visual communication seems to have mysterious qualities to those who have had little exposure to page layout and design. It can take several years to master the nuances of visual communications, but you can begin to design aesthetically pleasing publications that reinforce your message if you apply the basic principles reviewed in this book.

FORM AND CONTENT

The well-designed document or publication is easy to read, although the reader is not conscious of it. It just *looks* inviting. The messages it transmits are communicated to the reader clearly and unambiguously. Visual and verbal elements do not conflict with each other. If the text is a serious one, the publication looks serious. Each element within the text visually echoes the content of the written word. Important headings are large; less important elements look less important because they are smaller or lighter in tone. In design language this is known as *form* echoing *content*.

Form and content use two different channels for communication: visual and written



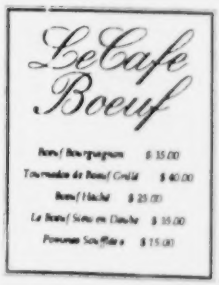


Figure 2.11: (right) The differences between an upscale restaurant and a fast food place are reflected not only in their pricing, but in the visual design of their menus.

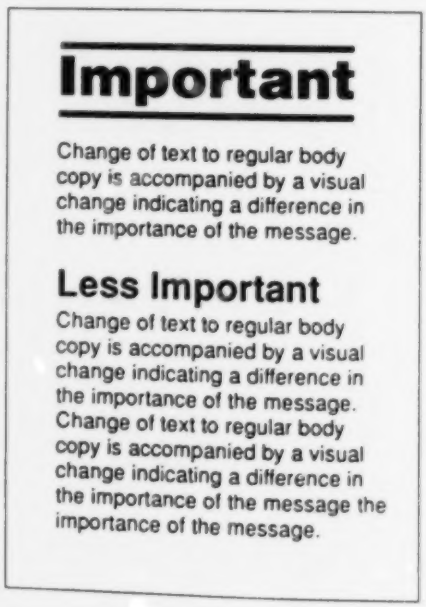

Important
Change of text to regular body copy is accompanied by a visual change indicating a difference in the importance of the message.
Less Important
Change of text to regular body copy is accompanied by a visual change indicating a difference in the importance of the message. Change of text to regular body copy is accompanied by a visual change indicating a difference in the importance of the message the importance of the message.

Figure 2.12: (far right) Levels of importance in text are reflected by the size and boldness of the type that is used.

language. The visual appearance of the text — how it looks and how it is arranged on a page — is called form. The written word of a publication, the text, is called content. As described earlier, form contains visual messages that can enhance or conflict with the content. When a message is communicated so that form and content echo each other, the reader finds the message easier to understand and to remember. Figure 2.11 illustrates how changes in visual presentation reflects differences in messages portrayed in printed pieces. Chapter 4 discusses this concept in greater detail.

A change of text category is accompanied by a visual change in structure. For example, notice that there is a distinct difference between the chapter headings, paragraph headings, and subheading used in this text. In this way, a reader is able to follow, with visual cues, the intent and arrangement of the text or written message.

A publication whose visual presentation is not coordinated with its text is the equivalent of wearing a sneaker on one foot and a dress shoe on the other.

STRUCTURE AND SPACE

Other aspects of form and content deal with structural and spatial arrangements. Breaks in the text are reflected by visual breaks on the page. As shown in Figure 2.12, important elements are made visually more important, bigger or bolder than the accompanying text.

Another support for good visual communication is through the use of a regular and repeated arrangement of text and illustrations that the reader unconsciously follows (see Figure 2.13.) The page layout follows an underlying skeleton, paragraph to paragraph and page

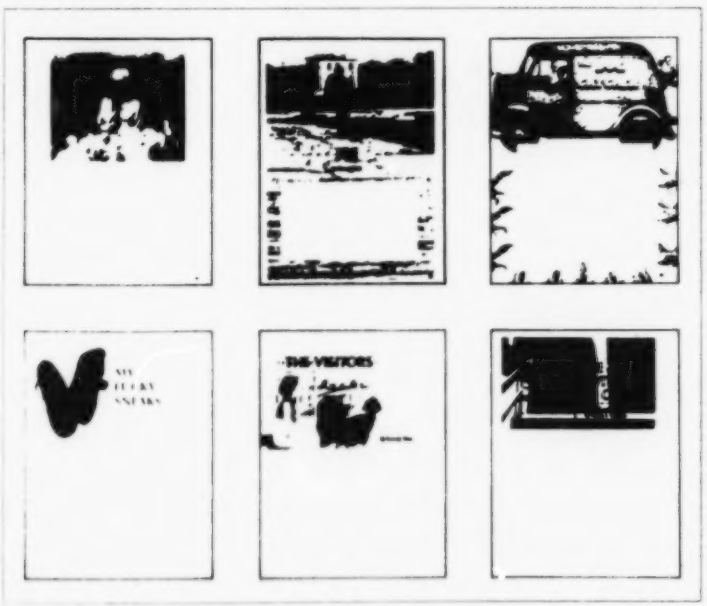


Figure 2.13: A regular arrangement of text and illustrations.

Figure 2.14: Comparison of publications for different audiences: (top) a book for teen-aged girls, (center, courtesy KCRW) a radio station newsletter, and (bottom) an annual report.

to page. Chapter 7, *Grids: Working With Structure and Space*, covers this aspect of design.

MOOD AND FEELING

In a well-designed document or publication, the mood and tone that the text communicates is replicated visually. When the message is a serious one, type and text arrangements also look serious. An annual report that looked like a new-wave graphic or an MTV music presentation would convey an ambiguous message — one of frivolity conflicting with a serious statement. A publication for teenagers, on the other hand, would be inappropriately designed if it looked like a corporate financial report (see Figure 2.14.)

TEXT AND VISUAL COMMUNICATION

When designing a publication for good communication you must also think about how well the material on the page can be read. Consideration must be given to four elements: legibility, readability, consistency, and relevance.

LEGIBILITY

Legibility is the extent to which the print is large enough and sufficiently well-formed to actually be read. Overinked, filled-in letters or smeared print are examples of text that is hard to read because it is not legible.

Print for beginning readers and the elderly, even when it is clean, is not actually legible unless it is larger than average.

READABILITY

Readability is a gauge of the amount of effort needed to read a document. Readability differs from legibility in that legibility is concerned with the clarity of the text; readability is concerned with the ease or difficulty in reading the type face design, size, and placement. Convention also affects what people think is readable. In the fourteenth century, the German black letter printing was easily read, but it is considered almost unreadable today (see Figure 2.15.)

CONSISTENCY

It is easier to read a publication when its page design is *consistent*. Consistency demands that any page elements used in the same way throughout a publication should always look the same and have the same locations and relationships to each other, page after page. For example, a main head should always be set using the same type face and size throughout a story. Likewise, the body text in that story should have the same width throughout, unless there is an illustration.

Inconsistent page design is confusing to the reader. A publication that is confusing to the reader is a poorly designed publication

Genesis
1 1 In the beginning
God created the heaven and the earth
2 And the earth was without form, and void;
and darkness was upon the face of the deep.
And the Spirit of God
moved upon the face of the waters.
3 And God said,
Let there be light:
and there was light.
4 And God saw the light, that it was good:
and God divided the light from the darkness.
5 And God called the light Day,
and the darkness he called Night.
And the evening and the morning
were the first day.
6 And God said,
Let there be a firmament
in the midst of the waters,
and let it divide the waters from the waters.
7 And God made the firmament,
and divided the waters
which were under the firmament
from the waters
which were above the firmament:
and it was so.
8 And God called the firmament Heaven.
And the evening and the morning
were the second day.
9 And God said,
Let the waters under the heaven
be gathered together unto one place,
and let the dry land appear:
and it was so.
10 And God called the dry land Earth;
and the gathering together of the waters
called he Seas:
and God saw that it was good.
11 And God said,
Let the earth bring forth grass,
the herb yielding seed,
and the fruit tree yielding fruit after his kind,
whose seed is in itself, upon the earth:
and it was so.
12 And the earth brought forth grass,
and herb yielding seed after his kind,
and the tree yielding fruit,
whose seed was in itself, after his kind:
and God saw that it was good

Figure 2.15: A copy of a page from the modern Washburn College Bible designed by Brodbury Thompson as compared to a copy of the same text designed by Gutenberg.

BEST COPY AVAILABLE

RELEVANCE

Relevance, the fourth member of the text type quartet, is concerned with visual emphasis. The importance of a text or graphic element is indicated by the size, type style, and the space it takes up. Its level of importance should be equal to its visual and spatial emphasis on the printed page. Newspaper headlines, for example, are larger and blacker than the rest of the text on the page to call attention to important news events. Magazines use headings that are large enough to stand out from the advertisements on the page to show the beginning of a story (see Figure 2.16.) For a more detailed discussion of legibility, readability, consistency, and relevance, see Chapter 6, *Type Aesthetics*.

The major elements that make up text in a document are covered in the next chapter. Publication elements require design using visual and spatial emphasis that is appropriate to the text reference and to the audience that you are reaching. These elements are similar to those used in speech, as shown in Table 2.2.

[1] McLuhan, M (1960), "The Effect of the Printed Book on Language in the 16th Century," in *Explorations in Communication*. McLuhan, M. and Carpenter, E.. (eds), MA, Beacon Press, 1960.

[2] Rand, P. (1970) *Thoughts on Design*. London, Studio Vista, 1970.

Figure 2.16: Typographic emphasis is shown by sizes of type and its placement.

BEST COPY AVAILABLE

CHECKING YOUR UNDERSTANDING

1. Give three examples of how visual language is used in our daily lives.

2. Briefly explain how the content of a publication may be changed based on the way the reader visually perceives the message.

3. Give five of the basic requirements for writing desktop publishing text.

4. List the four problem areas that must be addressed before you can begin a publication design.

5. Contrast how a speaker and a desktop publishing designer considers the audience to which the message is addressed.

6. List ten different publications currently available at your local library or school and then classify each of the publications according to purposes shown in Figure 2.9.

7. Explain the difference between the form and the content of a publication.

8. Give two examples of how this text uses structural and spatial arrangement as a design element.

9. Explain how mood and feeling of a publication's text can be replicated visually.

10. Explain the differences between each element of the text/type communication quartet: readability, legibility, consistency, and relevance.

BUILDING YOUR DESKTOP PUBLISHING DESIGN SKILLS

1. Collect samples of five different publication designs (brochure, magazine advertisement, flyer, form, newsletter, and so on) that illustrate good use of the basic principles of design discussed in this chapter, and five different samples that illustrate poor use of basic design principles. Prepare a cover sheet for each of your publications using a copy of the Publication Cover Sheet, Figure 2.17 in the Workbook/Forms Appendix.

PUBLICATION COVER SHEET

TO: _____ DATE _____

FROM: _____

Name of Publication _____

☐ Example of good design principle ☐ Example of poor design principle

Type of publication _____

Target audience _____

Basic purpose _____

Summary of text message _____

Explain how the form does or does not echo the content (give specific examples where possible) _____

Figure 2.17: Reduced copy of Publication Cover Sheet

2. Collect a minimum of four different publications (i.e., brochures, stationery, business cards, newsletters, and so on) for an organization or firm with which you are familiar. The organization may be a school club, an academic department within your school or college, a professional organization to which you belong, or the company for which you, a friend, or relative works.

Prepare a one- or two-page report that answers the following questions about the organization or company. Include your samples with your written report.

a) What is/are the primary product(s) or service(s) provided by the organization or firm?

b) Explain how this organization or firm differs from others that provide the same products or services.

c) List three adjectives that can be used to describe the audience to which your samples are directed.

d) List three adjectives that best describe the image the organization or firm image conveys in your samples.

e) Describe any identifying logo, motto, or slogan, and explain the image that is conveyed.

3. Prepare the text for an unsolicited letter of application that you can use to obtain a position in a field of your choice.

a) Before starting to write, take the time to answer the following:

- Who is my audience?
- How do I want my target audience to react?
- What image do I want to project?

b) After writing your text, check it over using the following criteria:

- Evaluate your writing style using the check list for text on page 23 as a guide.
- Proofread your text carefully for spelling, grammar, punctuation, and sentence structure.

c) Edit your first draft if necessary, and prepare a final copy. Include an introductory paragraph to the text that describes the target audience, the image you wish to project, and any other information that will help the reader evaluate the effectiveness of your message.

DESKTOP DESIGN WORKSHOP

The purpose of this section is to provide you with opportunities to develop and/or improve your desktop publishing design skills. The worksheet pages have been placed at the back of the book, and are designed so they can be removed and you can write, draw, or place your responses directly onto the pages.

WORKSHEET 2.1

Study the two sample desktop publishing publications. Review their accompanying "makeovers" along with the description of the firm using each publication. Working with the design principles presented in this chapter, and the description accompanying each publication, indicate why the changes reflected in the "makeovers" were made. Give suggestions for further improvement, if appropriate.

Communication: Visual and Verbal

Before Reading

1 The editors have included all of the listed items and more. If you like the way this chapter looks, reading it may be easier.

If you had a negative reaction to the various study aids or illustrations and graphics, reading the chapter may be more difficult.

Think for a minute about your negative reaction. Does it relate to this chapter or to something in your background? Can you decide to give the chapter the benefit of the doubt—at least until you've read it? If not, you'll just have to read a chapter to which you've taken an instant dislike. Good luck!

Before Reading ❷

To make these answers more "visual," the topics have been indented to show their relative importance, according to the graphic clues:

[1] The Way Things Look Is a Form of Communication
[3] Comparing Elements in Speech and in Print
[2] Comparisons Between Speech and Publication Elements
[2] Basic Requirements for Desktop Publishing Text
[1] Visual Communication
[2] Characteristics of Visual Messages
[3] Representation of Visual Elements
[2] Rules for Visual Communication
[3] Rules by Convention
[3] Rules Derived from Contexts and Settings
[3] Rules by How Our Minds Organize Information
[1] Design as a Skill
[2] How to Solve Problems with Design
[2] Define Your Audience and Its Environment
[2] Know the Purpose of Your Publication
[2] Know How You Want Your Audience to React
[2] Know the Image You Want to Project
[1] Design Aesthetics and Visual Communication
[2] Form and Content
[2] Structure and Space
[2] Mood and Feeling
[2] Text and Visual Communication
[3] Legibility
[3] Readability
[3] Consistency
[3] Relevance

By figuring out the graphic clues, you have provided yourself with an outline of the chapter, showing which topics are main ideas and which topics support those main ideas.

Continued on following page

The author's pattern seems to be to use a bold line above the four main parts of the chapter, with the topics of medium importance identified by capitalized bold type, and the supporting ideas in plain capitals.

Did any of these relationships surprise you? In the first section, having a "3" before a "2" seemed odd to me. Perhaps it's something for us to pay particular attention to when reading the author's information.

Before Reading ❸

Compare your responses with these:

1. The first objective is "Discuss how visual language can be used as a communication medium." Which of the headings and subheadings seem to be related to that objective?

   It may be just the first section "The Way Things Look is a Form of Communication." Or it may be the entire second section on "Visual Communication," but my guess (and hope) is that it's the shorter, first section!

2. Which headings and subheadings seem to cover "Summarize the basic requirements for desktop publishing text"?

   This one looks really easy! There's not only the heading "Basic Requirements for Desktop Publishing Text," but there's also the Checklist for Text labeled Figure 2.3.

3. Where will you find the information for "Describe how graphic design and aesthetics aid in the communication process"?

   Does this include both the third major heading "Design as a Skill" and the fourth one "Design Aesthetics and Visual Communication"? Maybe, if I'm lucky, it's only one of these.

   *According to my dictionary, **aesthetics** has to do with taste and beauty. Maybe I'll understand it better after reading that section!*

4. List the headings which relate to "Define communication problems and discuss how visual communications can help solve these problems."

   Hmm. I can't see anything labeled "communication problems." I do see the section under the third main part which talks about "How to Solve Problems with Design." Maybe that's what I'm looking for. But when I read, I'll have to remember to look for stuff about communications problems.

5. Which parts of the chapter will provide the information necessary to "Identify basic visual communication principles and explain how they aid in the design of aesthetically pleasing publications"?

   Yuk! Do these guys want me to pull together information from the part in section two on "Rules for Visual Communication" with the fourth section on "Design Aesthetics and Visual Communication"? Or will I luck out and find everything I need in that last part of the fourth section, "Text and Visual Communication"? I hate it when they skip around!

After Reading ❶

Compare your responses with these:

1. Summarize the basic requirements for writing text for desktop publication. Include at least five of the ten listed requirements.

   Text which is going to be desktop published must meet requirements that are basically the same as for any good piece of writing: text should be clear, brief, and personal, using active verbs and as little jargon as possible.

   After looking back at Figure 2.3, I'd change the list to read as follows: it should be clear, simple, and brief, with short sentences which use concrete language and active verbs. The text should be well organized and avoid jargon or sex-biased language.

2. List and define the four problem areas which must be addressed before beginning a publication design.

   The "problem areas" are the same as those of any writer: audience, purpose, occasion, and message. The first one, audience, has to do with who will be reading the text. Keeping the needs of the audience in mind is necessary in order to produce an effective text. Getting clear about the purpose also improves writing; informative, persuasive, or argumentative purposes can produce different results. Occasion (this isn't exactly the right word, I'm sure) has to do with the nature of the writing situation: casual, formal, etc. "Message" may not even be on the list.

   After looking back on pages 1B-18 through 1B-20 of the chapter, I'd keep most of the first three sentences, just making a few corrections: The "problem areas" are the same as those of any writer: audience, purpose, reaction, and image. The first one, audience, has to do with who will be reading the text. Keeping the needs of the audience in mind is necessary in order to produce an effective text. Getting clear about the purpose also improves writing. The rest will require several changes: Purposes include identifying, informing, selling, providing data, acting as a reference, or teaching. A third problem area is audience reaction. Being clear about the desired actions (buying, feeling positive, agreeing, etc.) will improve the writing. Knowing what the desired image is will affect the writing. For example, if I want readers to invest in my company, my publications must inspire confidence and trust.

Continued on following page

3. Explain the function of these aesthetic elements in visual communications: form, structure, space, and mood.

The elements of form, structure, space, and mood relate to taste and beauty in a publication. The form of a publication should support and clarify its content. So, too, should visual structure clarify the organization of the writing. The use of space, including white space (which is like silence in verbal communication) also contributes to the impression a publication will make on the reader. The mood of a publication can be affected by all of these elements, and it should support the desired feeling of the text.

After re-reading pages 1B-21 through 1B-22, I'll let this response stand as written. Though I'm not sure of the differences between some of these terms, I can't see any mistakes.

4. Define and explain the differences between each element of the text/type communication quartet: readability, legibility, consistency, and relevance.

The first element of the text/type communication quartet, readability, has to do with how easy the text is to understand. Legibility, on the other hand, has to do with the clarity of the typeface and the printing job. Consistency requires that elements of similar importance are presented in the same style so that structure is accurately indicated. Relevance (this is a guess) has to do with keeping related items in the same style . . .

After re-reading pages 1B-23 through 1B-25, I'd revise both the consistency and relevance parts as follows: Consistency requires that recurring elements (such as section titles) be in the same style and the same place throughout. Relevance reflects the level of emphasis an element is receiving. For example, the biggest newspaper headline calls attention to the most important story.

After Reading ❸

Do you agree with these answers and explanations?

1. E

   Authors who write material for desktop publishing should write clearly, simply and briefly. And they should use concrete language which is free from jargon and bias. But the checklist encourages use of the first person when it recommends that text "sound as if I am speaking" and be rewritten to "present the message I wish to convey."

2. A

   That ad on page 1B-17 showed an awareness that Los Angeles readers were less likely than New Yorkers to encounter doggie by-products while dressed for work. If there is an image problem, it's for dogs that don't eat Hi-Pro. Few readers would see both ads, so information about regional differences wasn't the point. Both ads had a light, casual tone—in keeping with the subject matter! Even if you couldn't remember the ad, analyzing that jogging clothes are more representative of LA and suits are more representative of New York leads you to choose the "context" answer.

3. D

   Form, structure, space, and mood are aspects of visual, not verbal communication, and of concern to desktop publishers (as well as art critics and beauty consultants) who are concerned that their aesthetics are showing.

4. B

   Look closely at the difference between readability (ease of understanding) and legibility (ease of making out the letters) on page 1B-23.

Spotlight on Technology: Getting a Job Electronically

Purpose for Reading

This one-page excerpt comes from a textbook chapter on résumés and applications. It might well be shared by an instructor wanting to provide you a glimpse of your technological future. Although this information is unlikely to appear on a test, it could be very useful to readers who plan to enter the job market, and that's just about everyone!

Plan to read this page for the personal value it can bring, whether it gives you new ideas, confirms your own experience, or makes you yearn for the "good old days."

Ober, Scott. "Spotlight on Technology." Contemporary Business Communication. Boston: Houghton Mifflin, 1992: 559.

Before Reading ❶

To get an idea of what is covered on this page, read

- the introductory paragraph
- the five headings
- the list of sources

Don't spend more than a minute on this preview.

Based on the few words you've seen, and limited only by your own imagination and experience, try a warm-up exercise in which you guess what the author will say about

1. getting a job electronically, including résumé software
2. registering on line
3. video résumés
4. scheduling recruiter interviews
5. processing applications

After your preview, write your warm-up guesses about the five topics here:

Before Reading

❷ Did you notice the dates and titles on the sources consulted in the development of this page? If not, look back again at that bottom paragraph.

What do the sources and dates tell you about the article?

During Reading

Unless you have discovered a heading with unknown terms, you're probably ready to read this article. Remember that you can be self-centered this time; you'll be reading to meet your own personal goals.

When reading for personal goals, feel free to change your reading rate or method depending on your interests. For example, you might skim or even skip a section that doesn't seem interesting. On the other hand, you might want to slow down or even re-read sections which seem especially valuable or new.

Please yourself as you read this article.

After Reading

❶ When you've finished reading, take a minute to mentally review the highs and lows of the article.

What sections or ideas did you particularly like? Did any parts seem boring or wrong or just not relevant to you? Write your response here:

After Reading ❷

Reading this article has probably given you some good ideas, and maybe a few new worries. If you want to check up on what technological aids to the job search are available today in your area, you'll have to do some looking.

Make a list of the people and places that could help you learn more about the technological approach to a job search.

Spotlight on Technology: Getting a Job Electronically

Ober, Scott. "Spotlight on Technology."
Contemporary Business Communication.
Boston: Houghton Mifflin, 1992: 559.
Copyright © 1992 by Houghton Mifflin Company.

Reprinted with permission from
Houghton Mifflin Company.

For permission to reprint
for classroom use,
contact:
Ms. Jill C. Conway
Houghton Mifflin Company
One Beacon Street
Boston, MA 02108
Phone: (617) 725-5811; FAX (617) 573-4997

SPOTLIGHT ON TECHNOLOGY

GETTING A JOB ELECTRONICALLY

Both employers and job seekers are making increasing use of technology to make the job-selection process more effective and more efficient. Let's follow Robin Gryder, a records-management major, as he begins his job search. Although some of the technology he uses may not be widely available or economical yet, they probably will be within a few years.

Résumé Software

To begin with, Robin purchases the *Résumé Kit*, a software program from Spinnaker Software (Cambridge, Massachusetts), to help him prepare his résumé. The *Résumé Kit* takes Robin through a sequential process that helps him organize his skills, experience, and education into a clear and concise format of his choice. When he selects from the nine different résumé styles available, the spacing, fonts, boldfacing, tabs, and underlining are done automatically for a customized résumé in minutes. In addition, the software program comes with a 100,000-word spelling checker, a word processor for writing cover and interview follow-up letters, and an on-screen calendar system for managing his schedule.

Registering on Line

Using his computer and modem, Robin then logs onto Dialog Information Services to make use of the Career Placement Registry, an on-line job service operated by Plenum Publishing of Alexandria, Virginia. This service, which has been operating since 1981, charges students $12 to post their résumés on line for six months, with an $8 renewal fee each six months.

Interested companies from around the country (or even around the world) can then search those résumés using a variety of criteria. The companies pay an hourly usage fee in addition to $1 for each résumé that meets their criteria and is called up for review and printing. Approximately 500 American companies currently search this database each month, and approximately 4,000 students list their résumés for the 600 or so positions that are filled monthly.

Video Résumés

Recognizing that a printed résumé does little to communicate how he talks, acts, and looks, Robin takes his job search one step further by contacting Res-A-Vue, a video marketing company in Connecticut. For a fee ranging from a few hundred to several thousand dollars, Res-A-Vue will prepare a professionally produced video résumé of a job candidate. Such résumés typically last about five minutes and give the candidate an opportunity to tell about his or her abilities and ambitions before a studio camera. Res-A-Vue then edits the tape to delete any weak or distracting footage and adds on-screen titles and background music. Robin can then send copies of the videotape to prospective employers to give them an opportunity to "meet" him before the job interview takes place.

Scheduling Recruiter Interviews

Using his computer again, Robin bids for an open interview slot with one of the on-campus recruiters. He can do this from the comfort of his dormitory room, 24 hours a day, seven days a week—not just when the placement office is open. He also uploads his résumé to the placement-office computer for the recruiter to review electronically.

As soon as he has scheduled an on-campus interview, Robin logs back onto Dialog Information Services and enters the Disclosure database to learn more about the company with whom he will be interviewing. Disclosure contains detailed information about all publicly held U.S. corporations, including annual reports, 10-K reports, and proxy statements. It costs approximately $20 to print out three years of information about the company, such as income statements and balance sheets; names, ages, and salaries of corporate officers and directors; the management discussion from the annual report; and a description of the products or services the company sells.

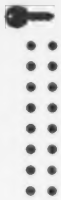
Processing Applications

One of the companies that received Robin's résumé was Apple Computer, of Cupertino, California. Every large, multinational firm receives thousands of such résumés each year; Apple, for example, receives 300,000 résumés yearly. It keeps track of them by scanning them into a minicomputer that reads key words from the text.

Employers are also using technology to lower the cost of interviewing candidates—especially for the early round of interviews. For example, one company, Corporate Interviewing Network (CIN), will interview candidates for an employer at one of its locations in every major city in the country. The employer specifies the questions used, and CIN furnishes the company with a videotape of the interview. The employer pays an initial $100 registration fee and $50 per interview—quite a saving from the hundreds of dollars typically required to fly a candidate to headquarters for interviewing.

Sources: "Apple Beats Résumé Flood," *PC Week*, September 18, 1989, p. 74; "Computers Can Make Best Interviewers," *USA Today*, July 17, 1989, p. [illegible] William G. Flanagan, "Interview . . . Take One!" *Forbes*, November 18, 1985, pp. 244–245; Claudia Gentner, "Tracking Information," *The National Business Employment Weekly* (College Edition), Winter/Spring 1989, p. 20; Tony Lee, "Landing a Job Online," *The National Business Employment Weekly* (College Edition), Winter/Spring 1989, pp. 19–21.

Spotlight on Technology: Getting a Job Electronically



Before Reading ❶

Compare your response to this one. While there are no "right answers" at this stage, responses can be more or less thorough. Does your answer cover all the five points requested?

Getting a job electronically sounds better than getting one in person because it might be less terrifying for shy types like me. I really like the idea of résumé software if it makes the résumé look good, because I'm convinced that a résumé has to look special to get read these days. I've seen plenty of registration "on line;" I've stood in lines for hours (hah!). Video applications to college were on 60 Minutes a while back, so video résumés can't be far behind. Again, they sound better to me than face-to-face contact. Scheduling recruiter interviews doesn't sound very technological, nor does processing applications. I'll just have to read the article to find out if I can get a job without ever having to speak to anybody in person. Who knows, with a modem I might be able to work for years without ever having to leave the comfort of my home.

Before Reading ❷

Again, your response will probably be different, but you might like to see how someone else answered:

The sources look appropriate and interesting: PC Week and Forbes particularly sound like magazines that ought to know what they're talking about. I'm not so sure about USA Today! On the other hand, these references are several years old. In technology, things change fast! It might be worth looking for a current copy of the National Business Employment Weekly (College Edition) when I next have to face the awful prospect of job hunting.

After Reading ❶

What sections or ideas did you particularly like? Did any parts seem boring or wrong or just not relevant to you? Write your response here:

Here's one response to the questions:

A lot of this article was interesting and kind of exciting. Right off, I liked the sound of Robin Gryder's major, "records management." That's one of my jobs at home, but I had no idea it could be a college degree! The résumé software sounds even better after I've read about it; I like the idea of a choice of fonts and styles.

I'm a little worried about what the recession might have done to that Virginia on-line job service; wonder if there's something closer to Texas. The idea of a video résumé both attracts and scares me; I've never seen myself on TV, but I doubt I'd like it!

What's this "comfort of his dormitory room"? Do I need a dorm to make an appointment? Having a database that can give you background on companies sounds fabulous! I wonder if they keep it so up to date that you could get the names of people you'd be interviewing with?

The fact that Apple scans applications makes me wonder if my application would get better attention if I used a hard-to-scan font. That would cause extra work for a clerk, but somebody might read it. If video interviews are going to be part of my future, maybe I better quit putting off that speech course. Right now, I don't think I'm ready for prime time in the job market.

After Reading ❷

The list of people and places will depend on where you are and who's available. Did you think of some of these?

- College Placement Office/Director
- Counseling Center
- Career Counseling Office
- On-campus computer labs
- Office Technology faculty and staff
- Library and librarians

Time and Stress Management

Purpose for Reading

This chapter focuses on a critical issue in our culture: how to manage time and stress. Although the examples and suggestions in this chapter relate specifically to office workers, an instructor might assign the material in hope of helping students manage time and stress in college as well as in the workplace.

Thus, your purpose for reading would be to satisfy both the instructional need to know the material covered in this chapter and the personal need to learn more about ways to lead a less stressful life.

Fulton, Patsy J. Chapter 9: "Time and Stress Management." Office Procedures and Technology for College. 10th ed. Cincinnati: South-Western, 1993: 235-251, and Manual (same): 79-80.

Before Reading

1 Preview the chapter to get an idea of the study aids offered by the author and how she organizes the information.

After your preview, check off the study aids that you noticed during the preview:

- ☐ General Objectives
- ☐ Illustrations including pictures and cartoons
- ☐ Figures that provide examples of ideas in the text
- ☐ Main Headings in large, bold type; subheadings in regular, bold type; important details in bold italics.
- ☐ Chapter Summary
- ☐ Terminology Review
- ☐ Discussion Items
- ☐ Case Study
- ☐ Office Applications

Check the statement that best describes the organization of the information in the chapter:

- ☐ Stress causes and reducers are discussed first, then time management problems and solutions are presented.
- ☐ Time wasters and the causes of stress are introduced, then the ways to overcome each are covered.

Before Reading ❷

How much do you know about the ideas presented in this chapter? Where do you expect to be able to skim or even skip familiar information? Where will you have to slow down to learn something new?

To answer the above questions, look carefully at the General Objectives. Can you already meet some of them? Mentally provide your answers to each of the objectives, then check with the Chapter Summary to see how close your answer is to the author's presentation of the material.

When reading about a topic where you already have considerable background, beware of a tendency to be passive and uninvolved. Use your previous knowledge to guide an active, rapid reading, in which you confirm whether this author is saying what you expected. Don't confuse information with behavior, either. If you "know" how to manage time and stress but find yourself constantly pressed for time and frequently feeling stressed out, maybe the presentation of ideas in this chapter will offer a new approach that will help you make some needed personal changes.

Have you taken the Perfectionist Test on page 1D-8? If not, do so *before reading*. Interrupting your reading to take the test when you get to that page will break up your concentration.

During Reading

When you have assessed your background knowledge about time and stress management, develop a plan for reading the chapter. You'll need to cover all of it, but you can decide where to break up the reading to keep your concentration high throughout.

Remember that your purpose includes both learning information and discovering personally useful tips. Allow enough time for each, but don't forget to maintain an active attitude and a rapid rate—especially in the familiar parts.

After Reading ❶

Are you satisfied with your understanding and memory of the author's various points?

Test your level of mastery by looking back at each major heading and reciting to yourself each subheading in the section. (Reciting will mean talking out loud to yourself if you're an auditory learner; visual learners will probably recite by writing down their thoughts).

Use the unusually complete Chapter Summary as an answer key. Did you remember the same information that the author included in the summary? If not, some more reading and self-testing may be needed.

After Reading ❷

As a test of your study, answer the eight Discussion Items on page 1D-19. Although this is not an assignment requiring edited responses, you should write your answer completely. It's pretty easy to fool yourself into thinking that you "meant" to include information that, in fact, you didn't remember at all.

Answer these questions on a separate piece of paper:

1. List and explain three causes of stress.
2. Explain how perfectionism can be related to stress.
3. Identify and explain four time wasters.
4. What is meant by the statement, "Time management is a misnomer"?
5. What are the attributes that an effective goal must have?
6. Explain how a time log can be beneficial in managing yourself in relation to time.
7. List three ways in which you might conquer procrastination.
8. Explain how time management systems can help you utilize time effectively.

After Reading ❸

Did you learn something that you can personally use to manage your time or your stress better? Take time to review that new idea and make plans for how you'll put it to practice.

Write down an idea or two that you learned from this chapter. For each idea, write down how you plan to implement it in your life.

Time and Stress Management

Fulton, Patsy J.
Chapter 9: "Time and Stress Management."
Office Procedures and Technology for College.
10th ed. Cincinnati: South-Western, 1993: 235-251,
and
Manual (same): 79-80.

Reprinted with permission from
South-Western Publishing Co.

For permission to reprint
for classroom use,
contact:
Ms. Donna Shelton
South-Western Publishing Co.
College Division
5101 Madison Road
Cincinnati, OH 45227
Phone: (513) 271-8811

9 Time and Stress Management

Americans are safer than ever before. The accidental death rate continues to go down. Consider, for a moment, three areas of safety—safety on the highway, safety on the job, and safety in the home. Here are some of the directions we are taking in these three areas. Speed limits on the highways have been reduced; laws have been enacted requiring the use of seat belts while driving; car manufacturers are installing air bags; and numerous individuals are enrolling in defensive driving courses in an effort to become safer drivers. At work, employers are adhering to the safety standards set by OSHA (Occupational Safety and Health Administration). Hazardous materials are disposed of according to the safety standards established by OSHA. Building planners and office designers are paying attention to lighting designed to eliminate glare and furniture designed to reduce fatigue. In our homes, we store cleaning fluids where our children cannot get to them; we keep our medicines in child-proof bottles; and we buy nonskid rugs for our floors.

Even though Americans are safer than ever before, our health behaviors are still putting our lives at risk. As a nation, we are drinking fewer alcoholic beverages, smoking less, and having more frequent medical examinations. However, more Americans are overweight than ever before and women's stress is at an historic high. Only one-third of our nation exercises three days a week or more, and we continue to eat foods high in fat and cholesterol even though most of our products are now carefully marked with the calorie, protein, carbohydrate, cholesterol, sodium, fat, and vitamin content. Americans consume pounds of fatty foods, work hard at high stress jobs, exercise very little, and have a high rate of heart disease, cancer, and strokes.

So, can Americans be healthier and less stressed? Do we have the medical research to help us understand how to do it? The answer is a resounding *yes* to both questions. This chapter will help you understand some of the causes of stress and how to control your time more effectively so that you might reduce stress. As you study this chapter, commit now to practice the techniques you learn.

Illus. 9-1 Only one-third of our nation exercises three days a week or more, and we continue to eat foods high in fat and cholesterol.

GENERAL OBJECTIVES

Your general objectives for this chapter are to

1. **Define the causes of stress.**
2. **Identify stress reducers.**
3. **Implement stress controls.**
4. **Determine the importance of utilizing time well.**
5. **Analyze how your time is spent.**
6. **Identify time wasters.**
7. **Establish effective time management techniques.**

STRESS—A MAJOR MALADY

We live in an information age. Knowledge continues to expand rapidly and new technology is the rule rather than the exception. We are constantly having to learn new ways of performing our jobs. The frequency of equipment changes and

the production of new software forces office assistants to learn new methods. Changing jobs and even careers is now more common than ever. In fact, you may change careers several times during your work life due to the changing needs of the workplace. All of these occurrences can and often do contribute to stress.

Stress is the body's response to a demand placed upon it. Our wants, needs, and desires are derived from stress of some kind. Stress cannot be avoided; and in fact, you would not want to avoid all stress. If you never felt a need to achieve, you wouldn't go to school. If you never felt a need to contribute, you wouldn't accept a challenging job. Thus, stress can and does have a positive impact on our lives. However, stress can also be harmful. Some situations in life can cause negative stress or **distress**. For example, when a family member gets sick, you feel negative stress. When you get sick or afraid, you experience negative stress.

Causes of Stress

Negative stress has numerous causes. A few of these causes are overwork, personal problems, and distressing work conditions.

Overwork **Productivity** is a key word in all businesses today. In order to compete in an international market, businesses are experiencing the need to be more and more productive. This productivity need means that employees are expected to produce more in less time and with a greater degree of accuracy than ever before. Many employees find themselves working long hours, getting more and more exhausted, and thus being able to produce less and less. Such behaviors produce negative stress. **Burnout**, absenteeism, low motivation, and even lowered self-esteem are negative side effects of long hours.

Personal Problems The divorce rate in America continues to be high. Single parent homes are prevalent. Many times the responsibility for rearing children falls on one parent. These responsibilities, along with having to make sufficient money to meet the needs of the individuals within the family, can produce negative stress. Americans are also living longer than ever before, and many times this long life means that families include elderly members who must have special time and care. Such responsibilities can cause negative stress.

Distressing Work Conditions **Ergonomics** is the study of the effects of the work environment on the health and well-being of employees. Although businesses are more and more aware of ergonomics, unsatisfactory working conditions still exist. For example, employees may sit at a computer terminal for hours at a time with few breaks. Many offices have no outside walls, and employees do not have a chance to enjoy the restfulness that can occur by observing nature. In addition, personality conflicts sometimes occur within the office. Coworkers can be unhappy in their personal lives, and this unhappiness can manifest itself on the job. You may be the innocent party who has to face an unhappy individual each day, never really knowing what kind of mood this person will be in. You may also encounter a difficult supervisor—one who is neither consistent nor considerate. You may be forced into trying to determine what your supervisor wants in relation to quality work. All of these situations can cause negative stress.

Stress Reducers

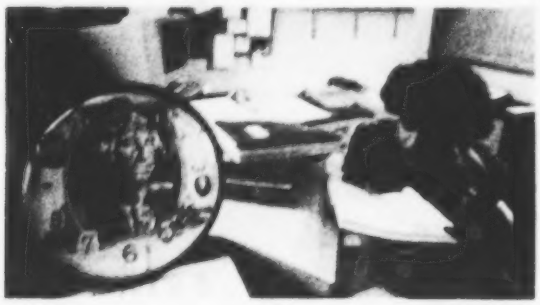
Although individuals can never avoid all negative stress, it is important that negative stress not be experienced for extended periods of time. Such negative stress is referred to as **chronic stress**. Chronic stress triggers the production of chemicals in our body which can cause damage. For example, high blood pressure, kidney damage, cardiovascular disease, migraine headaches, and ulcers can result from chronic stress. Thus, healthy individuals get rid of negative stress before it has a chance to damage their body. Here are some stress reducers for you to practice.

Balance Work and Play Oftentimes people comment that they work a 50-, 60-, or even 70-hour week. And, the statement may be made with a sense of pride. If a person is working such long hours, isn't he or she producing a large amount of work? Doesn't the individual have a demanding and challenging job? Isn't he or she appreciated and respected for the work contributions? Not necessarily. We know that there is a relationship between hours worked and productivity. Of course, individuals differ in the number of productive hours they can work. However, studies have shown that productivity decreases after extended periods of time. Most of us realize immediately when we are not being productive. When we become fatigued, the amount of work we produce goes down, and our error rate goes up. Such symptoms are signals that it is time for us to slow down and to take a break.

We actually can gain new energy by taking time to play. Maslow, a noted psychologist, talks about letting the child in us live. Too often as adults we have forgotten how to relax and, with complete abandon, enjoy the world around us. Some individuals writing in the field of creative energy urge us to take "joy breaks"—to actually have toys at our desk and to stop for two to five minutes to play when we feel overtired or nonproductive. Such play allows us to release built-up tensions, to open blocked thinking, and to trigger creative ideas. Take a few moments now and write down several things that are fun for you that you can do in a two-to-five minute break from your job.

Know the Difference Between Achievement and Perfection **Perfectionism** can be defined as a propensity for setting extremely high standards and being displeased with anything else. Although many of us are taught that it is important to do everything perfectly, this is not possible. Are you a perfectionist? Do you believe that everything you do must be done extremely well? Read the statements in Figure 9-1, and check those which apply to you. If you respond positively to all of the statements, you have probably bought into a negative, perfectionist pattern of behavior. Begin now to rethink how you view your work.

Illus. 9-2 Learn to take breaks and relax in order to avoid negative stress.



Certainly, it is important to achieve and to do things well; however, no human being can be perfect. And to blame oneself continually for not doing everything extremely well is to tie yourself up in energy-draining behaviors. Thomas Edison was asked one time how he came to hold so many patents. He answered that he dared to make more mistakes than ten other people put together and had learned from each of them. Edison knew that the creative process involves trial and error—failure and success.

Unless we are willing to risk failure, we will never grow and learn. Think for a moment about the last time that you did something that you considered perfect. What did you learn? Your answer probably was that you did not learn anything. We do not learn and grow from doing something extremely well. In order to learn and grow, we have to risk trying something new. For example, let's assume that you are asked to make a presentation at one of your professional meetings. You have

Figure 9-1 Perfectionist Test

1. If I don't do something well, I feel like I am a failure. ____
2. When I make a mistake, I spend many hours rethinking how I might have done it better. ____
3. I have a reputation of being someone who is hard to please. ____
4. When I am playing a sport (tennis, golf, basketball), I get angry with myself if I do not play my best game. ____
5. I will not start a project unless I know everything there is to know about what I am to do. ____
6. I don't like to try new things. ____
7. I lose patience with others when they don't do things well. ____
8. I expect every piece of work I produce to be perfect. ____

never made a presentation to the group before, and the idea scares you. However, you decide to accept the challenge and you make the presentation. Did you do it perfectly? No, but you learned in the process, and your next presentation will be better because you made the first one. When we do something the first time or even the second or third time, it is healthy to evaluate how it went. You can ask yourself these questions:

1. Where did I make mistakes?
2. What can I learn from my mistakes?
3. If I had it to do over, what would I do differently?

Once you have asked and answered these questions, let it go. You have risked and grown; you will be a more complete person because of it.

Recognize Your Limits It is most important that you recognize when you are working too hard. We have different energy levels; you may be able to work ten hours a day quite successfully. Your friend may be able to work only eight hours a day. How do you know when you are working too hard? People react in different ways to stress, but here are some symptoms of stress:

Anxiety	Panic attacks
Headaches	Muscular neck pain
High blood pressure	Muscular chest pain
Phobias	Insomnia
Gastrointestinal problems	Jaw pain

If you identify these symptoms, where can you go for help? Most insurance programs provide for counseling services through psychologists or psychiatrists. These trained individuals can help you discover the causes of your stress and how to alleviate it. Some hospitals provide stress reduction clinics and individual psychotherapy. Another source is to check with your family physician; he or she can provide sources of assistance.

There must be other things in your life besides work or you will quickly become nonproductive. You have already learned that you must take time to play. It is also important that you take time out in other ways. All of us need some time alone. People who are highly creative and people who are extremely productive seem to require significant time alone with their own thoughts. Time alone for you may mean that you get up early in the morning before your family and spend time admiring the beauty of the day. It may mean that you spend 30 minutes when you come home in the evening listening to music.

It is also important to spend quality time with your family and friends. So much of our energy is given to our work that many times we arrive home exhausted and merely want to flop on the couch. But, relationships with family and friends are essential to being a fully functioning individual. Through caring and nurturing relationships we refuel our tank and help others refuel their tanks.

We also need to take time off from the job. How many people do you know that seem to pride themselves on the fact that they haven't taken all of their vacation days in years? They seem to feel that if they aren't on the job, the company will fold. Of course, quite the contrary is true. All of us need to take extended time away from the job. Sometimes it is important to go to a different part of the country. Leaving the location of our day-to-day life can help us relax and let the issues or concerns of our daily existence go.

Exercise Cardiovascular specialists have found that regular exercise can lower blood pressure, decrease fats in the blood, reduce joint stiffness, control appetite, and decrease fatigue. Exercise changes the chemistry in the body, getting rid of toxins and producing endorphins and other hormones which increase creativity and silence negative self-talk. You will be more patient, calmer, more receptive to others, and a better listener after twenty to thirty minutes of aerobic exercise.

What type of exercise should you do? There are many exercises that are good for your body—swimming, walking, and bicycling, to name a few. Participate in an exercise that you enjoy. What time of day should you exercise? It depends on you. You may find it better to exercise in the morning. Contrary to what you may think, there are many exercise opportunities at this time of day. Several television channels offer instructor-led aerobic exercise programs. Fitness centers and the YMCA and YWCA open as early as 5:30 a.m. to accommodate people exercising before work. Determine a regular time of the day that you will exercise and then do it. When you begin exercising, go slowly. Train your body; don't strain it. If you have any medical problems, be sure to consult your doctor about the type of exercise that is best for you.

Illus. 9-3 It is important to spend quality time with your family and friends.

Eat Right What you eat or do not eat affects your overall health. Excessive intake of fat, sugar, salt, and caffeine contributes to poor health and to certain diseases such as hypertension and heart disease. Six ounces of coffee contain 180 milligrams of caffeine; six ounces of tea contain 70 milligrams; and twelve ounces of cola contain 45 milligrams. Nervousness, insomnia, headaches, and sweaty palms have been related to 250 milligrams of caffeine. Excessive amounts of caffeine can cause an individual to exhibit the same clinical symptoms as an individual suffering from anxiety.

The average American consumes more than 126 pounds of sugar a year. Excessive sugar consumption can lead to an increase in triglyceride levels in the blood which can cause cardiovascular disease. Too much salt can lead to an increase in blood pressure and to the development of hypertension. The wisest course of action for an individual is to lower the intake of fat, sugar, salt, and caffeine in the diet.

Your diet should include plenty of fresh fruits and vegetables. Drinking six to eight glasses of water a day is also very healthy. Whole grain breads with high fiber are good for your body. Maintaining a balanced, healthy diet will help keep your energy level high and your stress level low.

TIME MANAGEMENT

In the previous sections you learned that negative stress can reduce productivity, cause health problems, and even lower self-esteem. You also learned that we live in an information age in which changes in technology are impacting our jobs and even our careers. We are expected to be continual learners in order to keep up with the demands of our jobs. In addition, divorces continue at a high rate and more and more people are single parents, demanding added time and responsibilities in caring for children. All of these demands place constraints on our time.

For many of us, the vicious cycle begins when we feel we have too much to do in too little time. Decisions are made in haste and actions are taken under pressure. Planning is abandoned. Our effectiveness is diminished; deadlines are missed; productivity is reduced. Tempers build, and we become irritable with individuals on the job and our families at home.

You can see that there is a very close connection between time and stress. If we do not manage ourselves well in relation to the time we have, we become stressed. This stress in turn affects the way we do our job and the way we relate to people in our personal life. The vicious cycle continues, and individuals that are caught in it sometimes feel that they can do nothing to correct the situation. They feel out of control. But you can be in control of your time; and you must be in control if you are to be a productive employee at work and a caring, nurturing individual in your relationships at home. **Time management** is the way we manage ourselves in relation to time. We cannot actually manage time since time is finite. There is only so much time in a day; we cannot control how much time we have. However, we can control how we choose to use the time that we have. This section is about ways in which you can control yourself in relation to time and thus control your stress.

Time Defined

Time is a resource, but it is a unique resource. It cannot be bought, sold, borrowed, rented, saved, or manufactured. It can be spent, and it is the only resource that must be spent the minute it is received. Every one of us receives the same amount of time to spend each day; we all have 24 hours each day to manage in relation to our professional

and personal goals. We cannot speed up the clock or slow it down. Much is written in the literature about managing time; however, it really is not possible to manage time. Time passes at the same rate each minute, hour, and day. What is possible is to manage ourselves in relation to the time available. And, that is where the difficulty occurs. Many of us do not even understand how we are spending our time; we do not understand our time wasters; and we certainly are not taking steps to manage ourselves more effectively in relation to our time. Many of us haven't realized that once we have wasted time, it's gone; and it cannot be replaced.

Time Wasters

Before we begin to analyze how you might do a more effective job in managing yourself in relation to your time, let's look at some of the common time wasters. You will probably find that you have been guilty of most of these behaviors.

Poor Telephone Usage The telephone can be a time saver, but it becomes a time waster when you do not use it properly. Let's discuss some of the errors we make in using the telephone. We are often afraid of offending people, so we let them take more of our time on the telephone than is necessary. Certainly, it is important to exchange certain amenities; for example, saying good morning or good afternoon and doing so in a pleasant voice. But, we often allow ourselves to be caught up in hearing about the individual's latest vacation or how the family is doing. In other words, we sometimes allow our calls to be turned into a social occasion rather than a business occasion. Another way the phone can be a time waster is tied up with our need to know. All of us need to know enough about a situation to get our job done effectively, but we don't need to hear all of the details of a project. Still another way that the phone can be a time waster is when you fail to give and get the proper information. For example, you may fail to ask the caller what he or she wants to discuss with your employer. Or, you may fail to write the correct telephone number on the message pad. Taking personal calls on the job also becomes a time waster for many individuals. Certainly, there are times when there are emergency situations at home that necessitate a call. But, spending thirty minutes on a personal call several times each day becomes an unacceptable time waster.

Inadequate Planning Many individuals never plan what needs to be done on a particular day. Consider this situation. Assume that your employer has told you on a Friday afternoon that you must get out a report by Monday afternoon; you understand that it is a high priority job. However, you do not plan how long it will take you to do the job, nor do you block any time on your calendar for the production of the job. On Monday morning you have numerous interruptions including telephone calls, visitors, and one crisis after another. You do not begin the report until Monday afternoon at 4:00 p.m. As you get into the report, you see that it is very involved; there is no way that you will be able to finish your work by 5:00 p.m. At 5:00 p.m. your employer asks for the report. You are unable to produce it since you have not planned well.

Improper Handling of Visitors As an office assistant, your responsibility is to make visitors feel comfortable and welcome. However, that does not mean that you must entertain the visitors while they are waiting to see your employer. Sometimes that is the mistake that office assistants make. They spend too much time in conversation with office callers. Another mistake that occurs all too frequently in the office has to do with visiting with other office employees. Consider this situation. Robin, a good friend of yours, usually drops by about 8:30 a.m. to talk. You always enjoy seeing her, and you never intend to visit for long. However, your visits rarely take less than 15 minutes, and sometimes you spend as much as 30 minutes talking with her. You have used 15 to 30 valuable minutes on a social call and have thus been unproductive in your work.

Disorganization Does your desk have a mountain of file folders, with their contents spilling out onto your desk? Perhaps it also has a desk calendar open to last Wednesday and an old coffee cup with some coffee remaining in it from yesterday. Half-finished projects; half-finished memorandums; a stack of filing that is three weeks old. Disorganized individuals are a serious liability to their organization. They cannot be depended upon to provide information in a timely manner to others. They forget where the information is; they never meet deadlines because they have not written them down. They waste an enormous amount of their own time and other people's time in searching for files, phone numbers, reports, and so on.

Illus. 9-4 Disorganized individuals are a serious liability to their organization.

Procrastination **Procrastination** is defined as postponing or needlessly delaying a project or something that has to be done. Many of us are guilty of procrastination. We postpone a project because we are afraid that we will fail at it, because we aren't interested in the work, and even because we are angry with the person who delegated it to us. Of course, we don't want to admit any of these real reasons, so we make excuses. We say, "I have too many other projects; I can't add this one to the list right now. I don't have what I need to do the job. Before I can get started, I need to consult with Mr. Weinberger. There really is no rush to begin; it's not due for three weeks." Procrastinators are late for meetings, put off handling projects, and don't return telephone calls. Procrastinators may be such relaxed, easy-going people that the procrastination does not bother them as much as others. But, they can create stress for themselves with their last-minute efforts, and the stress they put on other members of their work group is significant.

Ineffective Communication Communication is a critical skill that is too often not well understood. We often take it for granted. We assume that if we know how to talk we can communicate. Such is not the case. **Ineffective communication** occurs frequently. This is communication in which the message intended by the originator is not understood by the receiver. If communication is to be effective, a number of factors must be in place. Everyone involved in the communication process must understand how words are being used. The communicator must choose the best channel to get the message across. For example, the communicator must determine whether the best channel is a letter, a telephone conversation, or a face-to-face meeting. The communicator must give enough information so that the recipient understands but not so much that the recipient tunes out. The communicator must understand what is happening in the world of the recipient at the time of the communication. For example, the communicator must ask whether the recipient is too busy to really hear the message or whether the recipient may be distracted by loud noises in the environment. Or perhaps the recipient is concerned about a project that is not going well and is thus unable to hear the message.

Time Management Techniques

You have considered the importance of time management and you understand that time is a resource that must be used well. You have looked at some of the time wasters that we all face. Now it is time to understand how you might do a better job of managing yourself in relation to time. This area is one that all of us must work on constantly. We never will become such effective time managers that we can forget about the constraints of time. However, if we pay attention to effective management techniques, we will find that not only do we seem to have more time to get our tasks done but that we have reduced the stress in our lives considerably.

Set Goals **A goal** is an objective, a purpose, or an end that is to be achieved. The idea of establishing goals makes many people feel uncomfortable. It has something to do with writing the goal down and then being expected to do it. It's like setting New Year's resolutions. How many of us set New Year's resolutions in good faith and then fail to reach any of them? If we even allow ourselves to think of these resolutions at a later date, we feel a vague sense of guilt about not having accomplished what we set out to do. Goal setting can produce this same type of hesitancy and guilt. But, if we are to accomplish anything on our job and in our personal lives, setting goals is essential. There is an old Chinese proverb that states if you don't know where you are going, any road will take you there. And, so it is. If we don't establish our goals, we become very undirected and may wind up someplace we didn't intend to go.

Organizational Goals Most all organizations are involved in strategic and organizational planning. When these plans are written, there are very definite goals to be accomplished and deadlines established in meeting these goals. Employees are usually brought into the planning process at some point. In fact, in many companies employees are asked to write action plans that reflect what they will be accomplishing to meet the goals of the organization. Then, during evaluation time, the employees are evaluated on how well they have met these goals.

If you are a part of your company's planning process, you will have a chance to understand where the company is headed. The company may ask you to write your own goals to show what you will accomplish in helping the company meet its goals. If you are not part of this formal process, it is still important that you set professional goals for yourself. In the day-to-day operations of the business, these goals may take the form of a monthly, weekly, and daily planning guide as to what you need to produce. In your long-range career planning, setting goals may take the form of identifying where you want to be in the company in five years, determining the education that you want to achieve, or establishing goals that mean a job or career change for you.

Personal Goals Personal goal setting is also important. This goal setting can take the form of deciding how much quality time you need to spend with your family and setting that time aside. It can also take the form of deciding when you want to purchase a house or a car and establishing goals so that you will have the resources to do this when the designated time arrives. It can take the form of planning in such personal areas as marriage and childbearing.

Goal Attributes There are certain attributes that effective goals must have. A goal must be achievable. A goal should stretch you so that you will have the opportunity for growth. A goal must be specific and measurable, with a deadline attached. A goal should be written down. A goal must be flexible. See the detailed explanation below.

1. *A goal should stretch you.* A goal should motivate you to do more than you have been doing; it should motivate you to reach a higher level of accomplishment. For example, assume that on your job you have several reports to prepare each month. The use of a spreadsheet software package would help you to prepare the reports more efficiently. You set your goal to learn a spreadsheet package; such a goal stretches you to use your intellect in learning a new process.
2. *A goal must be attainable.* Just as your goals should stretch you, they also should not be unrealistically high. You will only frustrate yourself with an unrealistically high goal, and you may also destroy your motivation to continue to set goals.
3. *A goal must be specific and measurable.* If your goal is vague and unspecific, you will not know when you have achieved it. For example, "to become a more effective communicator" is a goal that is too vague. How can you become a more effective communicator? You should determine behaviors in which you are going to be engaged in accomplishing your goal. You might say that you are going to listen 75 percent of the time to others; that you are going to use paraphrasing (repeating what you have said in different words) to help others to understand your communication; or that you are going to use direct and simple language when you are communicating. Then, establish methods for measuring the accomplishment of your goals. In the communication situation, you might determine that you are going to ask three people within the company with whom you have had communication problems if your communication is more effective.
4. *A goal must have a deadline.* Deadlines perform an extremely important function in goal setting. They allow us to track to see if the goal has been accomplished. A goal without a deadline is a dream. In the communication example given above, you might set yourself a deadline of three months to improve your communication. At the end of that three month period you should check to see if your communication has improved.
5. *A goal should be written down.* If a goal is not written down, it is easy to forget the goal or to change your mind about it. Serious goal setters write down their goals and check periodically to see where they are in the accomplishment of their goals.
6. *A goal should be flexible.* Sometimes conditions external to you impact your goals to the point that you cannot accomplish them. When this happens, don't cling stubbornly to something that is no longer possible. But, don't be too

quick to mark off your goal. It may be that by working smarter you can offset the external factors or you may be able to revise your goal or establish a different time frame for completion.

Analyze Your Time Although you might feel that you know exactly how you spend your time, most of us in reality do not. It is a good idea to check periodically how you are spending your time. You might be surprised at what is taking your time, and you might also discover some time wasters as you analyze your time.

Log Your Time One way to determine how you spend your time is to chart on a time log the amount of time you spend in various daily activities. Certainly, you should not become a slave to the log. It is not important that you be accurate to the second or minute. However, it is important that you are faithful to the process for a period of time so you might have a realistic picture of how you are spending your time. How long should you use the log? Usually, a week will be adequate to get a good picture of time usage. However, if a number of unusual things happen during the week, you might want to record your time for another week. Figure 9.2 shows one illustration of a time log.

Figure 9-2 Time Log

DAILY TIME LOG

Name Alexander Frost Day Monday Date 2-19

Time	Activity	Priority*	Interruptions (nature of)
8 30	Keyboard report	1 2 3	
9 50	Set up mailing	1 2 3	
10 00	Visit woman	1 2 3	
11 30	Return calls	1 2 3	
12 30	Lunch	1 2 3	
1 30	Keyboard letters	1 2 3	
2 30	File	1 2 3	
		1 2 3	
		1 2 3	
		1 2 3	
		1 2 3	
		1 2 3	

*Circle the number which indicates the importance of the activity. Priority key:
1 — Urgent, 2 — Do today, and 3 — Do when convenient

Analyze the Log Your next step is to analyze your time log in an attempt to discover ways in which you can improve the management of your time. Ask yourself these questions:

1. What was the most productive period of the day? Why?
2. What was the least productive period of the day? Why?
3. Who or what accounted for the interruptions?
4. Can the interruptions be minimized or eliminated?
5. What activities needed more time?
6. On what activities could I spend less time and still get the desired results?
7. Do I have all my supplies and materials ready before beginning an activity?

Prepare an Action Plan After you analyze your log, you must do something about how you spend your time. Make an action plan for yourself. Determine the positive steps you will take to increase your time management efficiency.

Use Good Techniques In deciding how you will manage yourself in relation to your time, you will want to use some of the techniques given here. Obviously, there are a number of techniques that you may use; a sampling is presented here.

Set Priorities Many times it will be impossible for you to do everything that you are asked to do in one day. Thus, you must be able to set priorities—to distinguish between the most important and least important jobs and determine the order in which they should be completed. If you are new to a job, you probably will have to have some help from your employer to determine what tasks are the most important. But once you learn more about your position and your employer, you should be able to establish priorities on your own.

Plan Your Activities A big help in planning is to establish a "to do" list. Put all of your tasks, activities, and projects on this list. Number each item. Include everything on your desk, in work piles, phone messages, reading, and so forth. Review your list. Mark the most important items A; less important items B; and those remaining C, or cross them off if they are not worth your time. Use your numbered list, with priorities in place, to

1. Stack papers in priority order; the A's in one pile, the B's in another pile, and the C's in a third pile. You will probably want to put the C's in a drawer so that your attention will be freed for the A's and B's.
2. Mark telephone message slips A, B, or C.

Set up a list of projects that need to be done during the month. Plan the next day in late afternoon or evening when today is fresh on your mind. Put down on your "to do" list what must be done the next day, again establishing priorities.

Estimate time needed for activities and tasks to make scheduling more realistic. This type of planning will take time initially, but when you become adept at planning it will take less time. However, the time spent in planning saves you time overall. Figure 9-3 illustrates a "To Do" list.

Conquer Procrastination Pick one area where procrastination plagues you and conquer it. Assume that you always put off filing. You find yourself having two and three weeks of filing stacked on your desk, and you are constantly having to rummage through the papers for something your employer needs. In your priorities, set aside 20 or 30 minutes each day (or whatever time you need) to do the filing; put it on your "to do" list. Check it off when you have accomplished it. Other ways in which you might conquer procrastination include the following:

1. Focus on one problem at a time.
2. Give yourself deadlines and meet them.
3. Tackle the most difficult problems first.
4. Don't let perfectionism paralyze you; don't be afraid to make mistakes.
5. Recognize that you have developed the habit of putting things off, and take steps to correct the habit. For example, set up a new routine that contrasts with your old one. Create whatever visual reminders you need; you may make a sign for your desk reminding you not to procrastinate. Don't let yourself make exceptions by saying, "It's okay to procrastinate on this job." A lapse is like a skid in a car; it takes much more effort to recover than to maintain control from the outset.

Figure 9-3 To Do List

To Do list

Monday, April 16

1. Correct letters from George Andrews.
2. Prepare report on telephone usage for the month.
3. Set up meeting with Travis Ueoka for next Wednesday.
4. Set up monthly budget meeting.
5. Begin going through files and pulling materials that are to be microfilmed.
6. Check on food for luncheon next week
7. Order two books for Mr. Andrews.

Handle Paper Once Do you ever find yourself rereading a piece of paper or shuffling it from the top of the stack to the bottom of the stack several times? Most of us do. In fact, most time management experts claim that handling paper over and over is the biggest paperwork time waster. The basic rule is to handle paper once. Read it, route it, file it, or answer it. Get it off your desk as quickly as possible.

Illus. 9-5

Credit: Reprinted by permission: Tribune Media Services.

Organize Your Work Area When you are working on a project, clear your desk of materials that relate to other projects. Put these materials in a file folder, label the folder with the name of the project, and place the folder in your drawer. Keep the items on your desk to a minimum so that you have the space to work.

Keep in and out trays on your desk, and label the trays so that it is clear which is for incoming material and which is for outgoing material. If space permits, you may wish to have a tray for material to be filed on your desk. An alphabetic file sorter will help you put materials to be filed in alphabetical order quickly. Keep frequently used supplies such as pencils, pens, and paper clips in the center drawer of your desk. Paper will generally go in the side drawer of your desk. Divide your paper into letterhead, plain bond, memorandum pads, and other types of paper that you use.

Reduce Interruptions As an office assistant, part of your responsibility is to screen calls for your employer. A skilled assistant can get the information needed without offending the caller. A polite, businesslike approach is essential. For example, you may say to the telephone caller, "I'm sorry; she's not available at the moment. May she return your call when she is free?" Then, it is your responsibility to take down the name, phone number, company affiliation of the caller, and purpose of the call. If the caller does not volunteer this information, you might say, "May I add a brief note as to what this call is about so she can be prepared when she returns your call?" Repeat the name, number, and message to the caller to confirm your understanding of it.

When you are placing calls, group them if possible. For example, if you have six calls to make, you may save time by making all the calls at once. Know the time of day when you can most likely reach people to save the likelihood of playing "telephone tag" with the individual. It is generally easier to get people during the early morning hours before they get tied up in meetings and in making outside calls. Set a time limit for your calls. A three-minute egg timer may look strange on your desk, but it can serve the purpose nicely. Don't let yourself get drawn into social chitchat. If you find yourself being drawn in, you can use statements such as this to extricate yourself: "Pete, I have a minor emergency here to handle so I must hang up. It was good talking with you." Limit your personal calls to emergency situations, and ask that your friends not call you at work.

Set Up Appointments For Visitors Discourage people from dropping by unexpectedly to see you or your employer. If a visitor drops by to see your employer and he or she is busy, ask, "May I help you?" or "May someone else help you?" If no one else can help, ask, "May I set up an appointment for you?" Make visitors to your office welcome, but do not feel that you must make small talk with them. Provide them with reading materials and continue with your duties. Discourage your co-workers from dropping by to socialize with you. Breaks are usually provided in the morning and in the afternoon. If you want to socialize, meet your co-workers for a break or for lunch. Make it clear that during working hours it is your responsibility to work.

Take Advantage of Time Management Systems There are any number of systems that will allow you to utilize your time well. The system may be a manual one or an electronic one.

Manual Systems One type of manual system is a calendar that allows you to record all appointments for the day, week, month, and year. Planning systems are also available; they include calendars but are much more than a calendar. For example, the system may include a calendar with two pages for each day. On one page, there are places to record your prioritized daily tasks and your appointments. On the other page you may record events of the day. Also included are monthly planning calendars for future years, pages to record values and goals, telephone/address directories, and delegation sheets.

Another type of manual system is a **tickler file**. This file is a chronological record of items to be completed. The system may be one that you design yourself or one that you purchase. If you are setting up the system, a guide for the current month is placed in the front of the file followed by a separate guide for each day of the month. At the back of the file are guides for each month of the year. To use this file, you write notes on index cards and file them behind the appropriate dates. Purchased systems are available which adhere to the same type of format using a folder system.

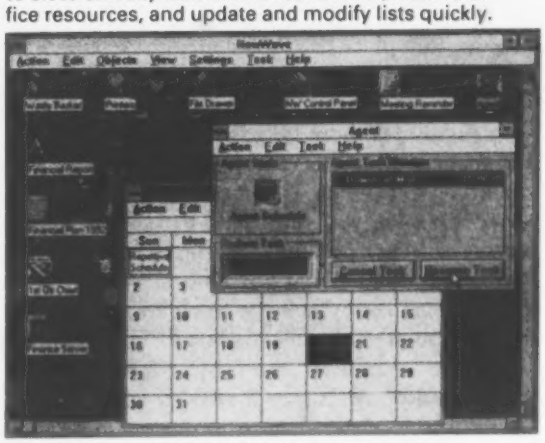
Electronic Systems An **electronic calendar system** allows you to electronically record calendar events, reserve office resources, and update

Illus. 9-6 Manual planning systems include calendars, pages to record values and goals, telephone/address directories, and delegation sheets.

and modify lists quickly. For example, assume that you wish to schedule a meeting with several executives in your company. Each executive's calendar is maintained on a personal computer. To schedule the meeting, call up the calendars of the executives and determine a free date and time for all parties. Then schedule the meeting on the electronic calendar of each executive. With such a system you are freed from the task of making numerous telephone calls to determine when the executives might be free for a meeting.

Another timesaving electronic system is the **voice mail system**. The office professional must make numerous telephone calls in the course of accomplishing routine tasks. Many times the office professional plays telephone tag with other office employees. With voice mail, a message can be left for the individual. The receiving party dials the message center to retrieve the messages. Time is not lost in getting busy signals or in being told that the individual is not available.

Illus. 9-7 An electronic calendar system allows you to electronically record calendar events, reserve office resources, and update and modify lists quickly.



Credit: Photo courtesy of Hewlett-Packard Company.

YOUR POWER AND POTENTIAL

Tom Peters, in his book *Thriving on Chaos*, states that "To succeed in a competitive global business

Illus. 9-8 If you are to thrive in the business world of today, you must be able to realize your full power and potential.

BEST COPY AVAILABLE

environment we must learn not only to survive in this chaos of rapid change, but thrive on chaos." If you are to thrive in the business world of today, to master the multitude of changes that will be coming your way in the form of technology, and to be productive and happy in your work, you must be able to realize your full power and potential.

When you are negatively stressed to the point of burnout on your job and when you are constantly fighting too few hours in the day to accomplish what you must accomplish, you are not able to realize your full power and potential. By putting to use the techniques presented in this chapter you will have the chance not only to succeed in your job but to thrive in a world in which rapid change will continue for years to come.

CHAPTER SUMMARY

The following review will help you remember the important points of this chapter.

1. Stress can be caused by a number of factors, some of which are overwork, personal problems, and distressing work conditions. Continual exposure to these factors over a period of time can cause negative stress which is harmful to an individual's health. Some of the symptoms of stress are anxiety, headaches, high blood pressure, jaw pain, gastrointestinal problems, muscular neck pain, and insomnia.
2. Stress reducers include
   a. Balancing work and play
   b. Knowing the difference between achievement and perfection
   c. Recognizing your limits
   d. Exercising
   e. Eating right
3. Time is a unique resource. It cannot be bought, sold, borrowed, rented, saved, or manufactured. It can be spent, and it is spent by each of us every day. It is not possible to manage time. What is possible is to manage ourselves in relation to the time available.
4. Time wasters can include
   a. The telephone
   b. Inadequate planning
   c. Visitors
   d. Disorganization
   e. Procrastination
   f. Ineffective communication
5. You can manage yourself in relation to time by setting both organizational and personal goals.
6. A goal must have certain attributes:
   a. A goal should stretch you.
   b. A goal must be attainable.
   c. A goal must be specific and measurable.
   d. A goal must have a deadline.
   e. A goal should be written down.
   f. A goal should be flexible.
7. If you are to effectively manage yourself in relation to your time, you must know how you spend your time. One way to do so is to log the time you spend on various activities for a period of time. Then, analyze how you are spending your time. Ask yourself if there are certain activities that you could spend less time on and whether some of your interruptions can be minimized or eliminated. Prepare an action plan listing how you intend to improve the way you manage yourself in relation to time.
8. Good time techniques include
   a. Setting priorities.
   b. Planning your activities.
   c. Conquering procrastination.
   d. Handling paper only once.
   e. Organizing your work area.
   f. Reducing interruptions.
   g. Setting up appointments for visitors.
9. Take advantage of time management systems. Time management systems include planners which incorporate calendars, pages to record values and goals, telephone directories, and delegation sheets. Electronic calendar systems allow you to electronically record calendar events, reserve office resources, and update and modify lists quickly. Voice mail systems allow you to leave messages for individuals without having to redial if the line is busy or no one answers.

TERMINOLOGY REVIEW

The following terms were introduced in this chapter. To help you understand them, definitions are given below.

1. **Burnout** *(page 236)* When an employee consistently has low productivity and low motivation and has a general attitude of disinterest in the job, it is referred to as burnout.
2. **Chronic stress** *(page 236)* Chronic stress is the experience of negative stress (stress that is harmful to our body and mind) for an extended period of time.
3. **Distress** *(page 236)* Negative stress or stress that is harmful to our body is referred to as distress.
4. **Electronic calendar system** *(page 245)* An electronic calendar system is a system in which the daily calendar of an individual is input and maintained on a microcomputer.
5. **Ergonomics** *(page 236)* Ergonomics is the study of the effects of the work environment on the health and well-being of employees.
6. **Goal** *(page 241)* An end objective or the purpose toward which an endeavor is directed is called a goal.
7. **Ineffective communication** *(page 241)* Communication in which the receiver does not understand what has been said or is unclear about the message being sent by the originator is referred to as ineffective communication.
8. **Perfectionism** *(page 237)* A propensity for setting extremely high standards and being displeased with anything else is called perfectionism.
9. **Procrastination** *(page 241)* Needlessly postponing or delaying a project or something that has to be done is called procrastination.
10. **Productivity** *(page 236)* Productivity refers to the amount of work produced on the job. That work may be in goods or services. If the productivity is not at an acceptable level, it is referred to as low productivity.
11. **Stress** *(page 236)* Stress is the body's response to a demand placed upon it.
12. **Tickler file** *(page 245)* A chronological record of items to be completed is called a tickler file.
13. **Time** *(page 239)* Time is a unique resource which cannot be bought, sold, borrowed, rented, saved, or manufactured. It can be spent, and it is spent by each of us every day.
14. **Time management** *(page 239)* The effective management of ourselves in relation to the time that is available is known as time management.
15. **Voice mail system** *(page 246)* A voice mail system operates via the telephone and allows voice messages to accumulate in a mailbox for later retrieval by the recipient.

DISCUSSION ITEMS

To demonstrate your understanding of the information in this chapter, respond to the following items.

1. List and explain three causes of stress.
2. Explain how perfectionism can be related to stress.
3. Identify and explain four time wasters.
4. What is meant by the statement, "Time management is a misnomer"?
5. What are the attributes that an effective goal must have?
6. Explain how a time log can be beneficial in managing yourself in relation to time.
7. List three ways in which you might conquer procrastination.
8. Explain how time management systems can help you utilize time effectively.

CASE STUDY

Antonio Previno, a new employee of TriCounty Regional Planning Agency, has become a problem employee for you. You have been asked by your employer to help him with the job, and you are trying. Although you have given him extensive instructions on handling the telephone, he still does not handle it properly. From the beginning of his employment he has asked you questions about each job that he does. Now that he has been here six weeks you think he should be able to work on his own. However, each day he comes to you at least six or seven times with questions about his work.

The amount of time that you spend with Antonio is impacting your own work. Last week you were late with a report for Mr. Andrews, and you felt extremely guilty for being late. Your relationship with Mr. Andrews has always been good, and he has been complimentary of your work. However, you could tell that he was not pleased with your lateness even though he didn't say anything.

Recently you have been having some problems at home. Although you do not live at home (you have your own apartment), you attempt to help your mother when she needs you. She has had pneumonia and has been in the hospital for two weeks. You go by each morning before work and each evening after work, and you have been taking her gowns home with you to launder.

The last few weeks have been tough. You have always liked your work, but you are beginning to feel that you really need a vacation. In fact, you have thought of looking for another job. Antonio is really getting on your nerves.

Respond to these questions about the case:

1. What is the problem?
2. What can be done about the problem?
3. Are there stress or time techniques which might be successfully employed?

OFFICE APPLICATIONS

Office Application 9-1 (*Objectives 1, 2, and 3*)

Analyze the two cases presented here, then respond to the items following the cases.

Two of your friends (Georgia and Harold) who work in offices in your building are having problems; they have both told you their situations which are given here.

Georgia's Situation:

Georgia has worked for a company for three years. Recently, she was promoted to administrative assistant for the president of the company. The job is a demanding one. Her responsibilities include setting up meetings, making travel arrangements for the president and the Board of Trustees, arranging meals before the monthly Board meetings, and responding to calls from the Board of Trustees about various items. In addition, she supervises two office assistants and takes minutes at the board meetings and the biweekly staff meetings called by the president, along with numerous other projects.

Georgia is attempting to employ a new office assistant, since one assistant has recently left for another position. This task is taking a long time. She is using a temporary employee until she can employ someone full time.

Georgia has two children, and she and her husband are in the process of getting a divorce. Her husband has fought her throughout the process. The situation at home has been difficult.

Georgia likes her job, but she is not being as effective as she knows that she can be.

1. Are there stressors in Georgia's work environment? If so, what are they?
2. Are there stressors in Georgia's home environment? If so, what are they?
3. What might Georgia do to reduce some of the stress?

Harold's Situation:

Harold has been working for Ingram Travel Agency for two years. The company is small, and there have been several personnel cutbacks since Harold began. Recently, due to a nationwide recession, there have been additional cutbacks. Now there are only two office assistants in the company (previously there were four). The other remaining office assistant has been with the company for only six months. Since Harold knows the operation well and has been with the company for two years, he has been asked to assume most of the responsibilities of the two assistants who have left.

Harold has always felt good about his abilities and skills. He is able to produce large amounts of work quickly. However, for the last two months, he hasn't been able to see the top of his desk. His employer has become irritable with him on several occasions when work was not completed on time. There never seems to be an end to the amount of work stacked on his desk; he can't get caught up. Recently Harold hasn't been feeling well or sleeping well. He wakes up two and three times a night thinking about the office. He has resorted to taking sleeping pills in order to get to sleep.

1. Identify the factors that have contributed to Harold's stress.
2. What steps can Harold take to minimize his stress?
3. In order to minimize future stress, how should Harold respond if he is faced with a similar situation?

Office Application 9-2 (*Objective 2*)

You have learned in this chapter that in order to reduce stress you need to balance work and play. To help you discover ways that you might do so, engage in the following activities.

On page 253 is a worksheet for your use. Select a classmate to work on this project with you. Discuss with your classmate things that are fun for you. List these items in columns according to the amount of time they take. Write down as many possibilities as you can.

Now that you have determined what you can do for fun in short periods of time, try your ideas for one week. Use the action plan also on page 253. After one week of engaging in these activities, go back to your action plan and analyze what happened during the week. Did you carry out your plan? Did you feel less stressed? Did you feel more productive? Did you enjoy your work more? Turn in your action plan and the analysis of your plan to your instructor.

Office Application 9-3 (*Objectives 1 and 4*)

Read three recent articles on time and stress management. Write your findings in report form, noting your sources. Team up with a classmate to compare your findings, and present a team report to the class. Turn in your written report to your instructor.

Time and Stress Management

Before Reading ❶

The author thoughtfully provided ALL of the study aids listed. If you missed any of these items, you should return to the chapter to locate them. Ask yourself why you didn't see the feature and plan to look for such items in future previews.

As for the organization, the top answer is correct:

[X] Stress causes and reducers are discussed first, then time management problems and solutions are presented.

[ ] Time wasters and the causes of stress are introduced, then the ways to overcome each are covered.

If you missed this second part, consider it a hint that you are not expecting enough from yourself when you preview. You might have picked up the answer from the General Objectives, the Chapter Summary, or from the order of the headings. Plan to hold yourself responsible for the order in which the material is presented in future previews.

After Reading ❷

The answers provided by the author in the Manual that accompanies the text are on the following pages.

The student is asked to respond to eight items; the items, with possible answers, are given here.

1. List and explain three causes of stress.
   a. *Overwork.* In order to compete in an international market, businesses are experiencing the need to be more and more productive. This need for productivity need means that employees are expected to produce more in less time and with a greater degree of accuracy than ever before. Many employees find themselves working long hours, getting more and more exhausted, and thus being able to produce less and less.
   b. *Personal problems.* The divorce rate in America continues to be high. Single parent homes are prevalent. Many times, the responsibility for rearing children falls on one parent. These responsibilities, along with having to bring in sufficient money to meet the family needs, can produce negative stress. Americans are also living longer than ever before, and many times this long life means that families include elderly members who must have special time and care. Such responsibilities can also cause negative stress.
   c. *Distressing work conditions.* Employees may sit at computer terminals for hours at a time with few breaks. The office may have no outside walls, and personality conflicts between employees and employers may exist.

2. Explain how perfectionism can be related to stress.

   Perfectionism is defined as a propensity for setting extremely high standards and being displeased with anything else. Of course, it is not possible to do everything perfectly. Individuals who consistently blame themselves due to their inability to perform perfectly can experience negative stress.

3. Identify and explain four time wasters.

   The student may list and explain any four of the following:

   a. *Poor telephone usage.* Business telephone calls are often turned into social occasions, and too much time is spent on these calls. The employee may also spend too much time on personal calls. Also, proper information may not be obtained from the telephone caller.

   b. *Inadequate planning.* Some people fail to plan their time by the day or week, resulting in work not being done efficiently.

   c. *Improper handling of visitors.* It is not the responsibility of the office assistant to entertain visitors. The office assistant should be pleasant and should assist the visitor in getting to the person he or she needs to see, but the assistant should not engage in excessive chit-chat with the visitor.

   d. *Disorganization.* A disorganized desk, half-finished projects, and inefficient filing habits are time wasters.

   e. *Procrastination.* Procrastination is defined as postponing or needlessly delaying a project or something that is to be done. Procrastination is a time waster.

   f. *Ineffective communication.* Ineffective communication (communication in which the message intended by the originator is not understood by the receiver) can be a time waster. Effective communication involves selecting the best channel to deliver the message, giving adequate information to the recipient, and delivering the message at a time that the recipient is ready to receive it.

4. What is meant by the statement, "Time management is a misnomer"?

   We cannot manage time. There is only so much time in a day; we cannot control how much time we have. However, we can control ourselves in relation to time—we can control how we choose to use the time that we have.

5. What are the attributes that an effective goal must have?

   a. A goal should stretch you.
   b. A goal must be attainable.
   c. A goal must be specific and measurable.
   d. A goal must have a deadline.
   e. A goal should be written down.
   f. A goal should be flexible.

6. Explain how a time log can be beneficial in managing yourself in relation to time.

   A time log can help you understand how you spend your time. Once you know how you spend it, you can then determine more effective ways of getting your work done.

7. List three ways in which you might conquer procrastination.

   The student may list any three of the following:

   a. Pick one area where procrastination plagues you and conquer it.
   b. Focus on one problem at a time.
   c. Give yourself deadlines and meet them.
   d. Tackle the most difficult problems first.
   e. Don't let perfectionism paralyze you; don't be afraid to make mistakes.
   f. Recognize that you have developed the habit of putting things off, and take steps to correct the habit.

8. Explain how time management systems can help you utilize time effectively.

   Time management systems include daily, weekly, and monthly planning calendars. Also included are values and goal sheets, telephone and address directories, and delegation sheets. All of these items help you to manage yourself in relation to time.

Evaluate your responses in light of what the author says. Are your answers roughly similar, radically different, more general, or more detailed than Dr. Fulton's? Use the results of your evaluation to improve your approach to textbook reading in your other courses.

After Reading ❸

No matter what your idea is, no matter how perfect a solution it is for one of your problems, you'll need a plan for putting this new goal into your daily life. Does your plan include these attributes of effective goals that Fulton lists on pages 1D-13 and 1D-14?

- A goal should stretch you.
- A goal must be attainable.
- A goal must be specific and measurable.
- A goal must have a deadline.
- A goal should be written down.
- A goal should be flexible.

Communication for Intercultural Business

Purpose for Reading

"Communication for Intercultural Business" is Chapter 20 in a business communications textbook. The title of the text, Business Communication: Toward 2000, suggests that the author is interested in preparing students for the future. One of the often-discussed aspects of the future for business is the increase in multi-nationalism and multi-culturalism. The Instructor's Resource Guide which accompanies the text suggests that a week near the end of the semester be devoted to reading and discussing intercultural business.

Given all the other details that have to get taken care of at the end of any semester, it's a fair guess that this chapter will get less than the attention it deserves from students and instructors alike. But those realities will not keep this information off the final exam.

By this point in the course, however, you would have the advantage of knowing that the instructor uses some of the material from the Instructor's Guide to help focus your reading and that exam questions will also be based on that material.

Bell, Arthur H. Chapter 20: "Communication for Intercultural Business." Business Communication: Toward 2000. Cincinnati: South-Western, 1992: 450-478, and Instructor's Resource Guide prepared by Dayle M. Smith. (same): 242, 244-245.

Before Reading ❶

Before even looking at the chapter itself, you can begin to get your brain warmed up by thinking about what you know about intercultural businesses and their communications.

Take a few minutes to jot down any ideas which come into your head about *communications* for *intercultural businesses*. Don't take time to write sentences!

Before Reading ❷

Now that you're aware of some of your thoughts and attitudes about the topic, preview the chapter to see what the author has to say and how the chapter is organized. Though the chapter is almost thirty pages long, your preview should take only a minute or two. Otherwise, you might get bogged down in details and become bored!

Look at these items during your preview:

- Learning Objectives, page 2A-7
- pictures
- marginal headings
- illustrations (called Figures in this text)
- Summary and Questions for Discussion, page 2A-32

Jot down the major topics that you remember seeing.

Hint: Major topics would be listed in the Objectives and Summary or Questions for Discussion as well as in marginal headings.

Before Reading ❸

In this course, the instructor hands out True/False Questions and Essay Questions as an introduction to each chapter. Answering the questions is not assigned, but one or two of the essay questions usually appear on the exams. The exams have multiple-choice questions, but they cover the same topics addressed on the True/False Questions.

Although you could save both until after reading, your chances of getting right answers are greatly increased if you know what you're looking for *before* you read.

Read the fifteen Essay Questions on pages 2A-35 and 2A-36 to see if they seem to cover the same major topics you discovered during the chapter preview. Mark those which seem to cover new material or which seem particularly hard.

Answer the ten True/False Questions on page 2A-34. Even though you haven't read the material, you can really get yourself involved by answering the questions. You might put a special mark beside questions where you are guessing. But answer them anyway!

During Reading

This is a long chapter with main topics throughout. Plan to read it in more than one session so that your concentration can remain high.

The section beginning on page 2A-12, "Eleven Common Areas of Intercultural Misunderstanding," is a major topic and one which demands that you take some notes. The human brain has a very hard time remembering lists this long, unless some special work is done to understand and retain the material. Your comprehension will probably be highest if you read the entire list through before you go back to take notes.

Make notes on this section, either by writing in the margin of the text or by making notes on separate paper. Whatever note taking style you use, make sure that your notes will help you *review* each item without having to re-read it.

After Reading ❶

Now that you've read the chapter, re-answer the True/False Quiz questions. Feel free to change answers now that you have better information to go on. If you feel unsure of an answer, look back at the text.

When you have satisfied yourself that you have the correct answers, use the ***Answer Key*** provided.

After Reading ❷

Look again at the fifteen Essay questions, concentrating especially on the ones you marked as having new or difficult material. Knowing that one or two of these will appear on the exam, you might be willing to write responses to all fifteen just to be prepared. On the other hand, you might feel that some of the questions are not likely to be asked, so you can concentrate your review on fewer questions.

Of the fifteen questions listed, pick the five questions that most reflect the chapter's major topics and are therefore most likely to be included on an exam.

After Reading ❸

Review the thirteen Questions for Discussion from the end of the chapter (page 2A-32). Can you answer each one? If not, review the appropriate text sections.

When you are satisfied that you are prepared for the exam which will include material from this chapter, answer the Exam Questions. Don't look back at the chapter or any of the notes and review questions you've answered.

Chapter 20:
"Communication for Intercultural Business"
EXAM QUESTIONS

Point Values: 2 points each for Questions 1-5, 10 points for Question 6. 20 points total.

1. Basic attitudes toward punctuality
   A. reveal how trustworthy a foreign business person is.
   B. are the same for members of western cultures.
   C. vary from culture to culture and person to person.
   D. should be insisted on by Americans.

2. Name cards
   A. are the same as business cards.
   B. have monetary value as collectibles.
   C. are considered inappropriate in Asia.
   D. contain information in two languages.

3. Techniques which might be useful in checking for comprehension include
   A. a puzzled frown.
   B. an inquiring smile.
   C. asking, "Am I being clear?"
   D. all of the above.
   E. B and C only.

4. According to the text, using slang or idiomatic expressions with foreign business persons
   A. may inhibit understanding and good will.
   B. may encourage feelings of trust and intimacy.
   C. will speed up the business meeting.
   D. will make the speaker sound less formal and uncomfortable.

5. When doing business in another culture,
   A. avoid listening to the experiences of colleagues.
   B. learning even a few words and customs can help.
   C. technical expertise will always be respected.
   D. behave exactly as you would ordinarily act at home.

6. Comment on this assertion: "Only those planning to work abroad need intercultural business training." Answer on separate paper. Feel free to make notes or a rough draft. Remember that this question is worth 10 points.

Communication for Intercultural Business

Bell, Arthur H. Chapter 20: "Communication for Intercultural Business." Business Communication: Toward 2000. Cincinnati: South-Western, 1992: 450-478,
and
Instructor's Resource Guide
prepared by Dayle M. Smith. (same): 242, 244-245.

Reprinted with permission from
South-Western Publishing Co.

For permission to reprint for classroom use, contact:
Ms. Donna Shelton
South-Western Publishing Co.
College Division
5101 Madison Road
Cincinnati, OH 45227
Phone: (513) 271-8811

COMMUNICATION FOR INTERCULTURAL BUSINESS

Learning Objectives

- To understand key areas of cultural sensitivity.
- To improve intercultural business relations through cultural knowledge and respect.
- To adjust written and spoken language to meet the needs of intercultural audiences.
- To recognize the importance of intercultural business relations for companies and organizations.
- To appreciate the role of intercultural training in preparing business people for intercultural trade.

BEST COPY AVAILABLE

WHAT WOULD YOU DO?

For the past six years [says Bob Francis], I've worked for a multinational corporation with offices in the U.S., England, Spain, Germany, France, and Japan. My own job as one of the company's U.S. tax specialists, however, has kept me entirely stateside. I spend most of my time working directly with employees on tax-related matters.

Several times a year, the company's training division offers an intercultural workshop for employees, who can sign up on a volunteer basis. The workshop apparently deals with understanding and communicating with members of other cultures. I've never signed up for the workshop because, given my specialty, I didn't plan to work abroad.

Of the 640 employees in Bob's New York office, more than one third come from racial and cultural minorities. Many of these employees continue the customs and practices of their cultures in their homes and social lives. Bob has mistakenly assumed that an intercultural workshop deals only with international topics. Does his job specialty make him a good candidate for the intercultural workshop offered by the company?

BEST COPY AVAILABLE

An Ever-More-Global Business World

Discussions of intercultural communication used to be intended for the few business graduates who would actually visit another country on business. For the 1990s and beyond, however, *every* business communicator needs to know how to interact successfully with members of different cultures. As many as one third of current business school graduates may have extended foreign business experience within the first five years of their careers. Virtually everyone in business will have business relations with a foreign company at some time. In addition, most businesspeople, during their careers, will be employed in multicultural work forces.

The opportunity for intercultural interaction may be right at hand in your own city. Urban areas such as Chicago, Los Angeles, Philadelphia, and New York City celebrate their cultural diversity. They can be viewed as cultural quilts, with enclaves of different ethnic groups set side by side. To do business in Miami, for example, you will want to know as much as possible about Cuban-American culture, for people of Cuban ancestry make up a major Florida market and an influential social force. In Los Angeles, many service industries and food-related businesses are dominated by Southeast Asian and Hispanic Americans. In New York, a day's walking tour will take you through a half dozen or more distinctive cultural neighborhoods.

You may find yourself working for an American company or a multinational corporation that employs people from several cultural groups in different locations in the world. Major business schools in the United States are already gearing up for what *Fortune* (July 17, 1989) called a "global vision": "Students will have to master a foreign language and culture as well as the usual tough material on marketing and finance." In 1989, more than one fifth of all agricultural and manufactured goods produced in the United States were exported abroad. That same year, we imported even more than we exported, for an import–export total of $600 billion. That level of trade spells thousands of jobs abroad for Americans each year.

Note at the outset that inter*cultural* communication involves more than inter*national* communication. *Intercultural communication* involves making connections between different views of the world, whether between countries or between cultural groups within one country. By contrast, international communication may involve parties of the same culture, as when an American businesswoman in San Francisco contacts her American colleague based in Paris.

This chapter is intended to help you prepare for communicating effectively with members of other cultures. Such preparation involves knowing your audience and knowing yourself.

The Meeting of Cultures

When you and your own cultural background come into contact with persons of another culture, something new emerges—a middle ground, called a "transaction culture." In this new middle ground, sensitive and often unstated rules and understandings guide behavior. That is, if a member of Culture A interacts with a member of Culture B, neither the cultural rules

of A nor those of B are the sole guide for behavior. Instead, a mixed set of rules—middle Culture C—develops for the purposes of the interaction.

For example, consider the cultural rules that would guide a business conversation between you and a manager from Japan. You would not speak and act entirely as you would when conversing with American coworkers, nor would the Japanese manager hold fast to Japanese conversational rules and behaviors. Both of you would consciously and subconsciously bend your own cultural habits and assumptions to accommodate the communication needs of the other.

In short, learning to be an effective intercultural communicator does not mean *becoming* Japanese, Russian, or African. In fact, it would be a big mistake to pretend to know more about someone else's culture than you really know. Nor should you pretend to understand or believe what you really don't understand or believe. For example, you should not pretend to understand or believe in the religion of a business associate. Instead, you should show your respect for the religion and try to understand it if it would help in your business interactions. To communicate with other cultural groups, you must be willing and able to adapt—but not discard—your own patterns of thought and behavior to meet the communication needs of your audience. That process begins with a sincere effort to understand another culture on its own terms.

Recognizing Cultural Misconceptions

Many forces can interfere with the desire to meet other cultures in a productive, mutually satisfying way. The most influential of these are internal beliefs and assumptions about other cultures—the *misconceptions* that may prevent successful intercultural communication. The following seven misconceptions frequently get in the way of successful intercultural communication:

1. *Everyone is essentially like me.* We too easily assume that others think as we think, feel as we feel, and therefore should act as we act. This egocentricity can blind us to very real differences in the way people of other cultures think and behave.
2. *Others lack my advantages.* Many people believe the reason that some people aren't like them is that there's something wrong with the people who are different. They explain away cultural differences as deficiencies. They call other cultures "disadvantaged" or "underdeveloped" when in fact they are simply advantaged or developed in other ways. A materialistic culture may judge a deeply spiritual culture as backward—and vice versa.
3. *All we have to do is just get together, and our differences won't matter.* Putting different cultures into contact will not automatically lead to mutual understanding and respect. The many examples of feuds between bordering cultures throughout the world show that more is needed than shared spaces.
4. *Don't worry, I speak the language.* Unfortunately, the formal language training provided in typical academic settings does not guarantee successful intercultural communication. To know how to speak and write a language does not necessarily guarantee that you know the culture. However, knowing the language *is* a great way to start learning about a culture.

BEST COPY AVAILABLE

5. *They'll see that I'm sincere.* In our culture, sincerity can forgive a multitude of blunders; we like to see that a person's "heart is in the right place." Some other cultures, however, pay more attention to what you do than to what you intend. An old Greek saying, for example, advises us to "know a good man by the way he lives."
6. *They have to respect my knowledge.* Not so. Many cultures place more importance on mutual trust than on technical know-how. Your competence or knowledge may not even be considered in such cultures until a trust relation has been formed.
7. *We're all interested in the bottom line.* Americans are used to doing away with formalities and procedures when they threaten profits or efficiency. In some other cultures, however, you may never violate the established *process* of doing business—including working through a rigid hierarchy, observing customary waiting periods, and completing elaborate paperwork.

To expose these beliefs as misconceptions is not to say that American cultural assumptions are wrong or that other cultural assumptions are right. Instead, the message is that cultural assumptions can differ.

Examples of Intercultural Misunderstandings

In each of the following situations, observe the unfortunate interference of one or more of the preceding cultural myths. Notice also the sometimes devastating effect of crossed signals based on a misunderstanding of gestures, expressions, and innocent actions. The first set of situations is given in the following "Communication Toward 2000" section.

Five additional examples may help to show the consequences of intercultural misunderstandings. First, in 1990, Carl Travis journeyed from St. Paul, Minnesota, to do business with Som Sharma at his huge clothing factory outside Puwabla, India. Carl wanted to propose a joint venture involving Sharma's money and factory and Carl's own American marketing contacts. Carl's proposal presented extraordinary opportunities for success by means of Indian import clothing shops in the United States.

As Carl presented his proposal, the taciturn Sharma shook his head from side-to-side. I'm not doing well, Carl told himself, and redoubled his persuasive efforts. Sharma shook his head back and forth more earnestly. After almost 45 minutes, Carl snapped his briefcase shut in consternation and stood up to leave. He apparently hadn't gotten to first base with his proposal.

Later, at his hotel, Carl learned an expensive lesson from the Indian concierge: Indians in many regions of the country express approval by shaking the head back and forth, the same gesture that Americans use for disapproval.

Second, Margaret Owens sat looking out at the Tokyo skyline from a managerial suite rented for the purpose of interviews. She wanted to find half a dozen enthusiastic Japanese representatives to market a line of pharmaceuticals in Japan. After completing ten interviews, Margaret was dumbfounded. Not one applicant spoke up in a direct, forceful manner, in spite of his or her stellar academic record and recommendations. Not one met her eye-to-eye for very long. None seemed comfortable speaking openly and frankly about accomplishments and aspirations.

Margaret reported her discouraging interview results to the Vice President of Asian Markets for the drug company—only to endure the most embarrassing lecture of her life. To speak up, she learned from the vice president, can be taken as impertinence, especially if one emphasizes personal accomplishments. To meet the eyes in some business situations is, in many Asian cultures, an indication of disrespect or even hostility.

Third, local mining magnates in Kajari, Pakistan, accepted Fred Revin's invitation to a business dinner at a local restaurant. Fred was pleased to begin the meal with nonbusiness small talk. But after 15 minutes of pleasantries, he wondered when the conversation would turn to business. He hesitated to broach business topics directly for fear of offending custom. The evening wore on in small talk, to Fred's immense frustration.

In fact, the Pakistani miners were wondering why Fred invited them to dinner. While several minutes of chat are ordained by Pakistani custom, the host—Revin—has the obligation to shift matters to business topics thereafter. Everyone was waiting for Fred to make his move.

Fourth, Jean Simonds was pleased to accept an invitation for dinner at the home of Klaus and Sonya Griegl, Belgian camera manufacturers. On her way to dinner, Jean spotted some lovely white chrysanthemums at a flower shop. She bought the flowers as a gift for her host.

To her dismay, the flowers brought a stiffly gracious response from her hosts, who set them aside quickly. White chrysanthemums, she learned later, are presented only to mark mourning in Belgium.

Fifth, in Venezuela, oil broker Cal Farnswell could not help but compliment Venezuelan manager Maria Ortiz on her gorgeous, flowing black hair. Obviously pleased, she received the compliment with a glowing smile. Cal then inquired if her hair was difficult to care for. The smile dropped. The American had trampled on an important Latin American custom: Avoid personal questions about the private lives of acquaintances.

Eleven Common Areas of Intercultural Misunderstanding

Each of these American businesspeople initially reacted with shock: "Well, how was I supposed to know?" Avoid asking yourself the same question. Don't attempt to interact in a new culture before becoming aware of your own assumptions and blind spots. The following 11 questions relate to areas of cultural sensitivity around the world. The more you know about another culture, the harder you may find it to answer each of these questions. That's as it should be. Simple answers to complex questions can lead to stereotypes, the enemy of intercultural awareness.

The 11 areas of sensitivity are male–female interactions, respect, time and space, taboos, commitments, nonverbal cues, language and translation, dress, methods of persuasion, religious and political issues, and prejudices.

1. How do *men* relate to *women*, and women to men? Though you may not agree on the fairness of relations between the sexes in other cultures, knowing their ground rules helps you avoid disastrous social and business pitfalls.
2. How does the culture indicate *respect*? Consider the roles of silence, direct questions, seating arrangements (such as the infamous seating struggles before

the Vietnamese peace talks), eye contact, gestures, gifts, compliments, and invitations. Also, find out whether specific categories of people (e.g., older persons, religious figures, more-senior staff) always receive some of these specific signs of respect.

3. How does the culture view human *time and space*? Does an appointment at 7 p.m. mean "7 sharp" or "sevenish" or, as in some Latin countries, around 8? Is one business day, once passed, gone forever (the American notion of linear time), or does the same circumstance repeat itself over and over (the Eastern cyclical view of time)? What of space? Should you stand a bit closer to Frenchmen than you are used to standing to Americans?
4. What are strict *taboos* in the culture? Is alcohol, for example, accepted, winked at, or absolutely unthinkable? Is your host's off-color joke an invitation for uproarious laughter or a subtle test of your own mores?
5. How are business *commitments* made in the culture? By oral approval? By a handshake? By signing of documents? Often American businesspeople believe that a verbal agreement shows that the listener agrees to the proposal and is committed to it. When they discover that their hosts are merely being pleasant and agreeable, they feel deeply disappointed and may even feel cheated. Try to establish in advance the words and actions in the culture that will let you know that your deal is moving forward to commitment. Try also to find out how people say "no" or avoid saying "no" in the particular culture.
6. What *nonverbal cues* are used in the culture to pass information to you, or to pass private understandings between members of the culture? How should you interpret the "V" sign in England? (Sometimes an obscene gesture.) How are you to understand an apology delivered with a big smile in Japan? (Utter sincerity, not a charade.) What does the eye pull mean in Italy and Spain? (Careful, I'm on to you.) Why does your host in India grimace when, in crossing your legs, you point your soles toward him or her? (An insult.)
7. How should you handle the whole matter of *language and translation*? It bears looking into before entering upon business relations in another culture. What words can you learn to indicate your interest in another culture? Should you supply your own translator? Will he or she be trusted? What should you conclude if your host insists on providing his or her own translator for you?
8. How should you *dress* for business and social occasions in the host country? Before "going native" in dress, consider the risks of losing your identity as a foreign visitor and hence your immunity to some forms of criticism. In our own country, no one expects the visitor wearing Tibetan ceremonial gowns to cope well with cabs, train schedules, and all the other hassles of urban life. We bend to help. However, the same visitor in typical American street clothes may be treated with irritation and impatience. Similarly, your clear identification as an American abroad may bring a modicum of helpfulness from the host country.
9. How do your foreign hosts handle *persuasion*? Do your hosts favor direct propositions supported by evidence? Do they wish to consider your reputation, your family roots, your personal success, your age, your sex, your educational attainments? Do they want to hear your arguments or merely to share your friendship? Do they base a business relation on rational analysis or on trust?
10. What aspects of the host country's *religious or political life* must be understood for effective business relations? Are certain times of the day set aside for worship, not work? Is work automatically canceled on some holidays, or is it

optional? Must certain work groups be separated due to political differences? Are some jobs tasks disliked for religious or political reasons?

11. What *prejudices* against you as an American must you overcome in the culture? Do your hosts automatically assume that you throw money around in a careless and tasteless way? Do they assume that your appetites for food, alcohol and sex are out of control? Do they look upon you as a steam-roller, who believes that might makes right? In all these matters, you may have to exert your imagination and energies to show yourself as you are, not as you are thought to be.

Categories of Cultural Difference

Not all differences create major misunderstandings or offenses between persons of different cultures. Nonetheless, these differences must be understood to enhance intercultural communication. The Language Research Center at Brigham Young University suggests several key areas for exploration for those getting to know another culture.

The following list shows general ways in which cultures can differ. In reading the list, compare your own culture in each category to another culture with which you are familiar.

1. **Greetings**—appropriate or inappropriate gestures (such as handshake or touching), verbal greetings (what to say), how close together persons stand when greeting or conversing, conversation topics, etc.
   a. meeting a person the first time
   b. everyday acquaintances
   c. close friends
   d. elderly people
   e. women
   f. youth
   g. children
   h. leaders in the culture
   i. to show special respect
   j. from a distance:
   k. use of family name or first name
   l. use of titles (such as Mr. or Dr.)
   m. compliments with greetings (what to compliment, how to give and receive compliments, and when)
2. **Visiting a family at home**—what should and should not be done in the following situations.
   a. greeting
   b. entering the house
   c. gifts and flowers (what is appropriate: when and how to give, receive and open gifts)
   d. compliments on possessions, decor, or to family members
   e. proper conduct (in the living room, parlor, or guest welcoming area)
   f. conversation (what topics are best and when people usually talk)
   g. table manners (seating arrangements, when a guest should begin to eat, excusing oneself from the table, etc.)
   h. utensils and how to use them
   i. conversation at the dinner table

j. compliments on the food
k. saying farewell and leaving
l. parties and social events (What should be remembered by a guest to best interact with the host and other guests? What is expected of the guest?)
m. words to avoid

3. **Talks, speeches, and public addresses** to groups of people.
   a. subjects or topics which these people are especially fond of or those which should not be referred to
   b. gestures which help or hurt communication
   c. the way the speaker stands or sits in front of the group
   d. hints on using an interpreter
4. **Meetings**—punctuality, best ways to begin and end the meeting, seating arrangement, eye contact, and using an interpreter.
   a. large formal meetings
   b. small group sessions (about 3–15 people)
   c. private interview with an individual
5. **Gestures**—those which help to carry a message and those which should be avoided.
   a. with hands
   b. head
   c. eye and eye contact, eyebrows, face (Is it customary to look a person directly in the eyes when speaking? What would be the reaction to this by a person in this culture?)
   d. legs (such as crossing the legs when sitting down)
   e. feet (moving things with them, pointing them at people, gesturing with them, putting them on one's desk, etc.)
   f. posture (standing and sitting down, hands on hips, etc.)
   g. touching (another person, male and female, etc.)
   h. shoulders
   i. arms (such as folding them or putting them around another's shoulders)
   j. smiling and laughing customs (When is a smile appropriate or inappropriate? In what situations does a smile mean something other than happiness and good will?)
   k. yawning
   l. calling someone to you with your hands (palm facing up or down, etc.)
   m. handing, passing, or giving things to another person
6. **Personal appearance.**
   a. clothing
   b. eye glasses and sun glasses
   c. hats
   d. other
7. **General attitudes** of (1) adults, a. male b. female: (2) teenagers, a. male b. female, about
   a. nature and [the human] role in it
   b. society, groups, and the individual, self
   c. wealth, clothes, possessions
   d. work, success, failure, and fate

e. government, politics, taxes, police, welfare assistance
f. personality traits that are considered good or bad in a person
g. role of men and women
h. sexual promiscuity, abortion
i. time, punctuality
j. youth, teenagers
k. elderly people
l. physically or mentally handicapped
m. business and economic progress
n. war and the military
o. crime and violence
p. majority groups, races and minority groups (special likes, dislikes, or problems)
q. other nations and their people (special likes, dislikes, or problems)
r. longevity, retirement and death
s. political systems (socialism, communism, imperialism, democracy, etc.)
t. humor
u. promises, agreements, and trust
v. community participation
w. revenge, retributions, repayment of wrongs received
x. animals, pets
y. showing emotions
z. gambling, drinking alcoholic beverages, drugs
aa. giving and receiving criticism
bb. making decisions in business, among peers
cc. education
dd. what possessions or achievements indicate status (for men and women, adult and youth)

8. **Language**—dialects, use of English, etc.
9. **Religion**—general attitudes toward religion, predominant beliefs.
10. **Special holidays**—specific dates and how these holidays are celebrated.
11. **The family**
    a. average size of family
    b. attitudes about the family and its role in society
    c. teenagers' role in the family
    d. role of the elderly in the family
    e. authority, obedience, roles of father, mother, and children (making decisions in the family)
    f. system of family inheritance
    g. milestone experiences in life for a male
    h. milestone experiences in life for a female
    i. special activities which are used to show that a person has become an adult (or otherwise changed social status)
    j. who in the family works (father, mother, children)
    k. average daily schedule and activities for fathers, mothers, children
12. **Dating and marriage customs.**
    a. from what age does dating begin? How important is dating? Why?
    b. is dating in larger groups or individual couples?

c. common dating activities
d. chaperones
e. acceptable and unacceptable dating behavior
f. engagement customs
g. attitude about marriage
h. age at which most men marry
i. age at which most women marry
j. how much influence the family has in deciding about marriages
k. prerequisites to marriage (such as completion of education or financial independence)
l. desirability of children (birth control)
m. attitude about divorce
n. attitude toward displaying affection in public (such as between husband wife or parents and children)

13. **Social and economic levels**— including size of different general classes, average income and what it provides for the family, general housing conditions and possessions (such as refrigerator, range, toaster, cars, radios, telephones, televisions, etc.).
14. **Distribution of group**—rural or urban, what cities or areas, group population for areas concerned and what ratio group population is to total population in these areas.
15. **Work.**
    a. the economy of the group (What are the main occupations of the people, industries, and important products?)
    b. individual work schedules (hours per day, days per week)
    c. age at which people begin working
    d. choosing a job
16. **Diet.**
    a. average diet, size of meals when they are eaten
    b. special foods which are usually given to guests
    c. Is mealtime important for some other reason than just nutrition?
17. **Recreation, sports, arts, music, leisure time.**
    a. family cultural and physical recreation and sports activities (including vacations)
    b. individual recreation, games, sports of children, youth, adults, and elderly
    c. distinctive arts of the culture which a visitor should know about
18. **History and government.**
    a. history of the group, including facts and events considered most important by the people and why
    b. heroes, leaders of the group and why they are esteemed
    c. group government systems, differences from regular local government
19. **Education.**
    a. education in the group
    b. any private education systems within the group
20. **Transportation and communication systems**—their use and significance to the group.
    a. bicycles
    b. individual cars and road system

c. buses
d. taxis
e. other
f. mass communication (such as TV, radio, newspapers, magazines)
g. individual interpersonal communication (such as telephones, postal service)
h. any special or unusual methods of trade, exchange, communication or transportation

21. **Health, sanitation, medical facilities**—including general attitude about disease.
22. **Land and climate**—including geographical effects on the history of the group, problems posed today by the geography or climate where these people are located.
23. **"Universal" signals or nonverbal cues** a newcomer should know that indicate approval or disapproval, acceptance or rejection in this society.

This list is a partial summary of some aspects of culture which can unite people who share the same basic attitudes, backgrounds, and lifestyles. Since these characteristics can vary widely between cultures they can be a source of misunderstanding and miscommunication.

Source: "Categories of Cultural Difference," Language Research Center, Brigham Young University, 1976. Reprinted by permission.

Examine Your Own Language and Cultural Habits

While you investigate your host country's customs and language, remember to examine your own ways of speaking and writing. You can aid your hosts in understanding your business communications in three key ways:

1. Avoid slang and idioms
2. Slow down your speech
3. Check your listener's understanding of what you're saying or writing.

Avoid Slang and Idioms

Learn to cut out slang and idioms (including local or regional colloquial expressions) from the words you use for international business. Robert Bell, a magnetic resonance specialist, comments:

> When I travel to business meetings abroad, I have to remember that my ordinary mode of friendly conversation contains many idioms (such as "right on the money") that foreign colleagues will find strange and uninterpretable. I remind myself to speak "plain vanilla" English around those who don't know the language well.

An American manager wrote the following sentence to a foreign businessman with limited English skills. "By the way, I've shipped the computer order we discussed last week." The American manager was shocked to receive a telex from his foreign client: "What is 'the way' you refer to? Urgent to know."

The English language is rich in such innocent idioms and Americanisms. For the sake of clear business dealings abroad, try to become aware of words and phrases that might be misunderstood.

Slow Down Your Speech

Adjust the pace of your speaking to match the rate of comprehension of your foreign host. You will often do business with men and women abroad who have, through hard work, acquired quite a bit of English. If you rush ahead at the same speaking pace you would use with a native speaker, you unintentionally dash these people's efforts to communicate with you. Before leaving for an international trip, practice slowing down your speech without sounding patronizing. Look directly at the person to whom you are speaking, so that he or she can see the words as they form on your lips and notice your facial and hand gestures.

Check for Comprehension

Some Americans, in speaking to foreign persons, frown quizzically as a visual way of asking, "Are you following me?" Try not to use the frown in this way. Unfortunately, this puzzled frown will often be misinterpreted as anger, criticism, or impatience.

Instead, when you want to check for comprehension, raise your eyebrows and give an inquiring smile. That visual gesture will produce either a nod of comprehension from your foreign friend, or an indication that he or she has not understood. Learn to check often (in polite ways) to see whether your listener is comprehending. In a telephone conversation, for example, pause to ask "Am I being clear?" or "Do you understand?" or simply "O.K.?"

In face-to-face conversations, do not mistake a courteous smile on your listener's face or a nod as a sign of complete comprehension. Particularly in Asian and Latin American cultures, your listener will give you a smile simply as a polite gesture. Asian listeners may even nod and say "yes" (*hai*) repeatedly, all in an effort to show respect to you. All the while, they may almost entirely misunderstand what you are saying. Good barometers of such misunderstanding are the eyes. Watch to see whether your listener's eyes respond to your words. If you notice a glazed, lost look, back up and begin again in a simpler fashion. Another helpful technique is to politely ask the other party to say back (or write back) what he or she understood you to say. In working with a translator, this process is called "back translation."

Where to Learn about Other Cultures

From the preceding discussion, it's clear that no business person can afford to learn about other cultures through personal blunders and insults. There are many ways to learn about other cultures before you step into your first intercultural business meeting or send off an important report to an international office. These techniques include visiting a country's embassy or consulate, participating in cultural training, asking people who have lived in or visited the country of interest, and studying the language.

Visit the Country's Embassy or Consulate

Most trade-seeking nations maintain experienced ambassadors and consuls with extended staffs in major U.S. cities, particularly New York, Washington, DC, and Los Angeles. You can make an appointment with the commerce secretary at the embassy to learn how to approach businesses—and often whom to approach—when you visit the foreign country.

BEST COPY AVAILABLE

If you cannot visit the person, write a letter describing your business interests. Solicit the help of the embassy in making your venture mutually profitable.

Seek out Cultural Training

Many schools, clubs, and organizations provide cultural awareness training. The following groups will provide you with information about their services and general advice about cultural preparation.

Overseas Briefing Associates
201 East 36th Street
New York, NY 10016

The Business Council for International Understanding
The American University
Washington, DC 20016

The Intercultural Communications Network
1860 19th Street, N.W.
Washington, DC 20009

A benefit of such organizations is that they can acquaint you with such universal business conventions abroad as *name cards*. Similar in size and format to business cards used in this country, name cards contain not only your name, title, and company in English, but also on the reverse side the same information translated into the language of your host country. Especially important in such a translation is the statement of your title. Corporate "president," for example, in English does not signify the same thing in Japan. There, a "president" is an honored, retired, and relatively powerless former leader of industry. Probably your title as "president" would be rendered "senior director" to communicate your status clearly in your host country.

Such name cards are given and taken freely in your business dealings. You may easily dispense a hundred such cards in your first week in a foreign country and take in twice that number. Many countries publish name card collection books, complete with hierarchical interior divisions so you can store your collected name cards in a pecking order of sorts. Without such cards of your own, you may have difficulty establishing your credentials in business contacts that come your way through the day.

Ask People Who Have Been There

Except for your own personal experience, the most valuable information you can get is the helpful hints from someone whose background is similar to your own. Find out whether anyone in your company or another company has visited the country in question. Find time to listen to stories of his or her experiences. The ultimate authorities on a different culture are, of course, the people of that culture. Seek out their advice for how best to handle written and oral communications.

Also, ask questions and seek guidance from secondary resources, such as the country's national airline serving your city (Swiss Air, British Airways, and so forth). At such places, you probably will meet someone here who knows someone over there—and that someone can prove invaluable to you as an initial cultural contact.

American banks that do business abroad, and foreign banks in this country can often prove helpful to you. Also, draw upon the considerable resources of the United States Chamber of Commerce. It publishes a number of booklets on trade relations. Each foreign country seeking trade will probably also have a chamber of commerce anxious to serve you. In most cases, you can reach this office by writing to the Office or Ministry of International Trade in the capital city of the country that interests you.

Study the Language

Above all, begin *language training* in the tongue of the culture you intend to visit. If you don't at least try to learn the language, you'll be totally dependent on a translator or virtually isolated from the friendly conversations. Don't be concerned that you haven't mastered the language. Your hosts will take it as a compliment that you are at least trying to learn their language at all and will help you at every turn.

Writing for Intercultural Business

Business documents in different countries differ not only in form but also in pattern of organization, tone, and level of detail. German documents, for example, are terse and heavily detailed, while Latin American documents emphasize a polite style and generalized concepts. Reports for Japanese associates must be prepared with formal, honorific openings. Casual analogies and other non-business-related information get cut from the reports and proposals sent to British colleagues.

Even when you try to follow the style and tone of the documents written by native business people in Latin America, Asia, and Europe, your Americanness will still show. Some of that is fine. Intercultural readers, whether located inside the U.S. or abroad, expect American communications to show the features of American document conventions.

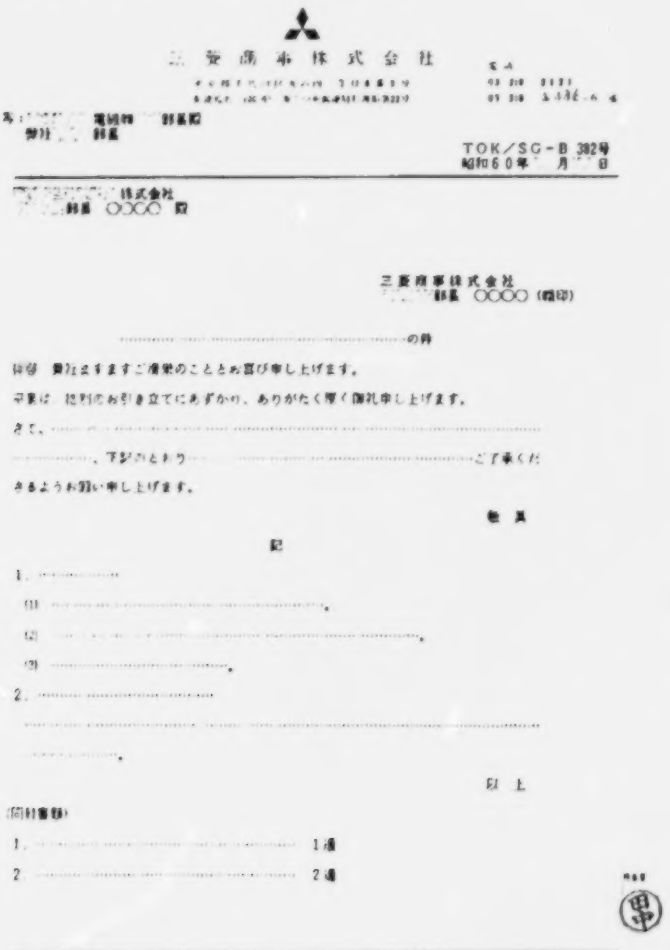
Nonetheless, shrewd intercultural communicators still try hard to *bend* their writing habits and assumptions toward the communication needs and expectations of their readers. As a case in point, many European cultures expect significant business correspondence to end with two signatures—the signatures of both the letter writer and his or her superior. Therefore, to get a more positive reaction from a European reader, the American letter writer may decide to use two signatures.

An American writer may even have to learn when not to write at all. As reported in separate studies by Michael Yoshino and William Ouchi, Japanese companies don't use written communication for routine business matters as much as American companies do. If an American writer communicates solely by memo, a Japanese reader may tend to treat the message as being inappropriately serious or important—calling a meeting, for example, to discuss the implications of the memo. Instead, alternate channels of communication should be chosen: a conference telephone call, perhaps, or a face-to-face meeting with selected decision-makers.

A final example involves the use of first names. In American correspondence, it is common after the first two or three business contacts to begin addressing the reader by his or her first name. This practice is generally taken in our culture to be a sign of friendliness and trust. In Germany,

however, business readers look upon the use of first names ("Dear Helmut") as a sign of inappropriate chumminess bordering on disrespect. For Germans, friendliness, trust, and respect in correspondence is demonstrated by the writer's willingness to use titles and last names: "Dear Director Schmidt." Figures 20–1 through 20–10 show some examples of international memos and responses.

Figure 20–1 The Mitsubishi "Model Memo" Guide for Managers



三菱商事株式会社

TOK/SG－B 382号
昭和60年　月　日

株式会社
課長 ○○○○ 殿

三菱商事株式会社
課長 ○○○○ (㊞印)

……の件

時候 貴社ますますご清栄のこととお喜び申し上げます。

平素は 格別のお引き立てにあずかり、ありがたく厚く御礼申し上げます。

さて、……、下記のとおり……ご了承くだ
さるようお願い申し上げます。

敬 具

記

1. ……
(1) ……。
(2) ……。
(3) ……。
2. ……
……。

以 上

(同封書類)

1. …… 1通
2 …… 2通

BEST COPY AVAILABLE

The memo in Figure 20–2, written by a Mitsubishi manager, and its English translation in Figure 20–3 shows how the American "To/From/Subject/Date" material has been redistributed at the top of the memo page. An official seal—the personal trademark of a Japanese manager—appears beside the name. By Japanese business tradition and Mitsubishi practice, this memo begins with standard language of respect. Following this tradi-

Figure 20–2 A Japanese Manager's Memo

テンポラリーワーカーズ株式会社　御中　　1989年10月 2日

五番商事株式会社
取締役人事部長
山田　太郎

秘書派遣承諾依頼の件

拝啓、

貴社益々御隆昌の段お慶び申し上げます。また　平素より格別のお引き立ての程誠に有難く存じます。

扨て、御賛の件に関し、弊社に於きましては、今般米国GE社と合弁企業を設立する運びとなり、新会社の為の秘書要員を　名新規募集致します。就きましては、貴社の幅広い人材の中から、下記条件に適合する候補者を弊社人事　迄御御推薦頂ければ幸いです。貴社より御推薦頂きました候補者につきまして、追って面談日時等を取り決めさせていただきたく存じます。

お忙しい中とは存じますが、本件に就いての御検討を宜しくお願い申し上げます。

敬具

記

弊社希望条件　1．英語能力（英検　級以上）
2．和文ワードプロセサー（　級以上）
3．コンピュータ経験有り

以上

tional expression of respect and well-wishing, the memo turns to its specific business—in this case, the hiring of two secretaries. Note that the requested qualifications of these secretaries is appended to the memo in the form of "supplements," a common Japanese way of handling lists and details. The memo ends by turning again to traditional, expected language. No signature appears after the phrase "with our best regards."

Figure 20–3 An English Translation

Messrs: Temporary Workers Corporation

October 2, 1989

Five Diamond Corporation
Director, General Manager
Taro Yamada
(official seal)

Subject: Secretary Recruiting

Dear Sir:

It is our pleasure for serving you. I would like to take this opportunity to thank you for supporting our company for many years.

* (Meantime,) We have finalized a plan to establish a joint-venture with GU Company, our American partner. And we have started looking for two secretaries for this project. Among your numerous capable candidates, we wish you can recommend two people to us with the undermentioned abilities. We will set up interviews with the appointed candidates immediately after receiving your recommendation.

* (We guess that you are busy, however,) We will appreciate your reply as soon as posible.

With our best regards.

Supplements

Requested Conditions

1. Fluent English ability (above JST grade-2)
2. Japanese wordprocessing ability (above grade-2)
3. Experience of computers

*Approximate equivalents for untranslatable Japanese phrases.

BEST COPY AVAILABLE

Figure 20–4 shows an American response to the Japanese manager's memo in Figure 20–1. The American memo endeavors to catch the form and spirit of the Japanese memo form without mimicking it in all details. The American writer would probably fail badly, for example, in trying to imitate all the nuances of the traditional Japanese beginning and ending. In this memo, the American writer begins rather formally, addresses the request

Figure 20–4 An American Response to a Japanese Memo

Five Diamond Corporation
Director, General Manager
Taro Yamada

October 3, 1989

Temporary Workers Corporation
Vice President
Richard Matthews

Subject: Your Request for Secretaries

Thank you for contacting Temporary Workers Corporation for your employment needs. We have certainly enjoyed being of service to you for the past four years.

After a careful review of sixteen highly skilled candidates, we have selected two secretaries to meet the needs you describe. Both are available at your convenience for an interview. We believe their considerable skills (listed below) will justify their employment.

We recognize that these are indeed busy times for you. However, we will be most pleased to hear from you as soon as possible to schedule interviews.

With sincere best wishes.

Supplements
Qualifications of Both Candidates

1. Grade 3 English ability in speaking and writing
2. Grade 3 Japanese wordprocessing ability
3. Experience with Japanese and American computer systems

in a general way, and highlights details by a numbered list. But why go to the trouble to follow Japanese practice in these matters? A typical memo in the succinct, frank American style may have been misunderstood by the Japanese manager as an impatient, glib, or even mildly insulting response. In the Latin American memo and its English translation, Figures 20–5 and 20–6, note the distribution of the message on the page (somewhat lower

Figure 20–5 A Chilean Manager's Memo

MEMORANDUM No. 532

Ant.: Su memorandum no.228
de fecha 25.7.89.
Mat.: Solicitud de una
secretaria adicional.

Santiago, 12 de septiembre de 1989

DE: GERENTE DE FINANZAS

A: GERENTE GENERAL

De acuerdo a su memorandum de antecedente, me dirijo a usted con el objeto de solicitarle una secretaria adicional para nuestra gerencia. Como es de su conocimiento, nuestra unidad ha tenido un gran crecimiento en los últimos 5 meses. Se han contratado tres jóvenes profesionales y no se ha aumentado nuestra dotación de personal administrativo. En la actualidad contamos con tres secretarias, muy competentes, pero que no dan abasto con todo el trabajo requerido. Esto no nos permite alcanzar el rendimiento deseado.

La naturaleza de nuestras operaciones hace indispensable que la secretaria que se contrate tenga dominio del idioma inglés, tanto oral como escrito. Adicionalmente, debe estar familiarizada con el uso de procesadores de texto y de Lotus 1-2-3.

Agradezco de antemano su consideración.

Atentamente,

Juan González R.

than American practice); the convention of assigning numbers to memos; the use of "Antecedent"; the respectful tone, particularly in the memo opening; and letter-like conclusion. Figure 20–7 shows an American response to a Chilean memo.

Figure 20–6 An English Translation

MEMORANDUM #532

Antecedent : your memorandum
#228 of 07.25.89

Subject : request of an
additional secretary

Santiago, september 12, 1989

FROM : FINANCE MANAGER
TO : GENERAL MANAGER

Regarding your memorandum of antecedent, I am addressing you with the object of requesting an additional secretary for our department. As you know, our unit has had considerable growth during the last five months. Three young professionals has been recruited and the administrative staff has not increased. At present we have three very competitive secretaries, but they are not able to do all the work required. This has not permitted us to obtain the desired performance.

The nature of our operations make indispensable that the secretary that will be hired has proficiency in oral and written English. In addition, she must be familiar with the use of word processors and lotus 1-2-3.

Thank you in advance for your consideration,

Sincerely yours,

Juan Gonzalez R.

BEST COPY AVAILABLE

Figure 20–7 An American Response to a Chilean Memo

Memorandum #541

Antecedent: Your memorandum #534, Sept. 12, 1989

Material: Response to your request for an additional secretary

To: Finance Manager
From: General Manager

Regarding your request for additional secretarial support, I wish to suggest an alternate way of resolving the problem you describe. Instead of hiring an additional secretary, I propose that you send overflow typing and accounting work to the General Manager's secretarial pool. These employees are often seeking additional work and should be able to give you the support you require.

I have asked the Word-processing Supervisor to make specific arrangements with you for routing work expeditiously.

Thank you for bringing this problem to my attention and for your cooperation in trying out the solution I suggest.

Sincerely,

Helen Williams

In the Russian memo and its English translation, Figures 20–8 and 20–9, note the initial gesture of respect, followed by a straight-forward—even blunt—statement of the problem. This business seems to contain an emotional message as well, especially in the passage regarding Mashinka's drinking. The memo closes, as it began, on a highly formal note. The writer signs his full name.

Figure 20–10 shows an American response to the Russian memo.

Figure 20–8 A Russian Manager's Memo

09.I.89

Святослав Николаевич Кислородов
Заместитель директора по кадрам

Уважаемый Товарищ Кислородов,

У нас в отделении АСУ не хватает секретарши. Несколько дней уже у нас нет способности даже выполнять все очередные документы. А сейчас опять-таки запила Машинка. Что нам делать? Пожалуйста, немедленно дайте нам разрешение добавить лишь одну секретаршу.

С уважением,

Борис Иванович Боголюбимов

Figure 20–9 An English Translation

9/1/89

Svyatoslav Nikolayevich Kislorodov
Deputy to the Director for Personnel

Respected Comrade Kislorodov,

We do not have enough secretaries in our MIS department. For the last few days we have not even been able to fill out the regular documents. And now Mashinka has somehow again taken to drink. What are we to do? Please, immediately give us permission to add at least one more secretary.

With respect,

Boris Ivanovich Bobolyubimov

Figure 20–10 An American Response

9/2/89

Boris Ivanovich Bogolyubimov
Supervisor, MIS Department

Honored Comrade Bogolyubimov,

Supervisor Kislorodov has askd me to respond to your memorandum of Sept. 1, 1989. Like you, we feel the daily need for additional secretarial support. Our official documents are often prepared less quickly than we would wish. Such delays must be expected for the next several months until we receive final approval for Resource Allocation Request #607.

I will look to you for patience and ingenuity in continuing to perform your duties admirably under the current conditions. I request that you send Mashinka to meet with Supervisor Kislorodov at 10 a.m., Sept. 15, 1989.

With great respect,

William Evans Phillips
American Liaison for MIS Research

BEST COPY AVAILABLE

Making Presentations in Intercultural Settings

Just as American approaches to business writing must be adapted to intercultural conventions, oral presentations must be adjusted to what intercultural audiences expect and prefer. Again, an American presenter's goal is not to be taken for a native speaker but instead to adapt successfully to the culture's expectations, with the goal of delivering a culturally acceptable presentation.

Five elements of the presentation should be reevaluated in preparing for an intercultural address:

1. The introduction
2. The method of presenting an argument
3. The use of visual aids
4. The use of humor
5. The conclusion and recommendation

The Introduction

Many cultures expect the speaker to recognize and pay respect to members of the audience, often in the order of their importance. It may be culturally taboo to start off with business early in the presentation. In some cultures, speakers may be expected to give a great deal of background information about themselves and their company.

How do you know what to do? It's best to discuss your presentation plans with an experienced business speaker who is a member of your audience's culture. Ask advice on what approaches will be most acceptable to your listeners.

The Method of Argumentation

Typical American presentations describe a problem and then go on to suggest possible solutions. This approach may be unpersuasive and even offensive to some cultures. The blatant description of a business problem may be taken as a slight against your audience's country, culture, or company. An intensely proud group of African businesspeople, for example, may rankle at a speaker's opening remarks about starvation or poor rural planning. In many cultures, you may be better off describing your suggestions as a "next step in a glorious heritage." Often, this approach is much more persuasive than the problem–solution approach.

The Use of Visual Aids

American speakers typically rely on slides, graphs, charts, and other visual aids to do much of their communicating. The use of such materials is often taken by American audiences as a sign of the speaker's preparation and expertise. This is not so for some other cultures for which visual aids interrupt the important process of personal evaluation and bonding. To get an idea of this, think about your own reaction if a new acquaintance who was invited to your home for dinner brought along charts of his educational history and a videotape of his sports prowess. While these matters might come up naturally in conversation, you would probably feel that the visual

aids were a bit much. In the same way, some cultures do not place the same importance on visual aids as do American business audiences.

The Use of Humor

For American presenters, keeping an audience awake and alert often involves the periodic use of humor, anecdotal stories, and other attention-getting techniques. These should be checked carefully with a native presenter before you use them in an intercultural speech. There is a fine line between what's funny and what's offensive in all cultures. Even in closely aligned cultures, such as that of Great Britain and America, the types and uses of humor can vary greatly. The British by and large cannot fathom what's funny about Johnny Carson; Americans groan at the romping silliness of many BBC sitcoms. Such differences are magnified many times over when the cultures involved do not share common ancestries, religions, or political systems.

The Conclusion and Recommendation

American presenters are often told to ask for the sale – that is, to explicitly tell the audience what should be done. In many cultures, such directness is taken as the worst form of rudeness. Conclusions and recommendations in these cultural settings must be handled with great delicacy so as not to appear high-handed or pushy. Decision-makers in your audience must be credited with the ability to see the implications of your presentation; their agreement or action must be subtly suggested or invited.

Your Future as an Intercultural Businessperson

As the ability to know – almost instantaneously – transforms lives and cultures around the planet, no businessperson can hide in a regional or national niche and expect to avoid the influence of the Information Revolution. While a hardware store owner in Wichita may not sell hammers to China, he or she will want to be the first to know when hammers imported from Poland are sold 20 percent cheaper than the American variety. Larger corporations will have no reason to limit their marketing horizons to national borders, especially as jet travel and communication devices make the world what McLuhan calls a "global village." "There are no passengers on spaceship earth," he wrote. "We are all crew."

In the words of John Naisbitt, author of the best-selling book, *Megatrends*,

> We are living in the "time of the parenthesis," the time between eras (between the Industrial Era and the Information Era). The time of the parenthesis is a great and yeasty time . . . a time of great change and uncertainty (and we must make uncertainty our friend) . . . and a time of great opportunity. In stable eras everything has a name and everything knows its place . . . and we can leverage very little. But in the time of the parenthesis we have extraordinary leverage and influence . . . individually . . . professionally . . . and institutionally . . . if we can get a clear sense, a clear conception, a clear vision of the road ahead. My God, what a fantastic time to be alive!

BEST COPY AVAILABLE

Summary

1. Businesspeople must recognize the importance of cultural differences.
2. This chapter suggests eleven key areas in which cultures can be evaluated.
3. Several agencies offer cultural awareness materials and training for businesspeople.
4. Because language is the most important link between people, businesspeople should examine their own use of English in relation to the language needs of their foreign listeners.
5. At all levels, business is becoming internationalized. Business trips to and communications with other cultures will be a reality for more and more businesspeople in the years ahead.

Questions for Discussion

1. What are the eleven areas of cultural sensitivity?
2. How could the use of human time and space affect your business transactions in a foreign country?
3. What are some steps you may take in order to acquaint yourself with a foreign culture?
4. What are name cards? How are they used?
5. How should you rely on a colleague's personal experience in a foreign country you plan to visit?
6. What is probably the most significant way you can prepare ahead for your visit to a foreign country?
7. Why is it important to speak "plan vanilla" English in business meetings abroad?
8. When speaking English with a nonnative speaker, what habits should you avoid?
9. How can visual gestures aid your communication with a foreign businessperson who does not speak your language well?
10. How can you check your listener's comprehension over the phone?
11. In a face-to-face conversation, what are good ways to check for comprehension?
12. Explain Marshall McLuhan's statement, "There are no passengers on spaceship earth. . . . We are all crew."
13. What is the "time of the parenthesis"? What are its advantages?

Exercises

1. Pick a country that you would like to visit on business some day. Write a letter to the embassy or consulate of that country, requesting as much information as is available on travel and business opportunities there. Keep this information in your files for future use.
2. Research attitudes on the relationship between men and women in the country of interest to you. How might the relations between the sexes in this country affect your communication with your host?
3. Extend an invitation to a potential business associate in a foreign country. Convey the proper respect for his or her culture.
4. Continue your research on the foreign country of your choice, and identify strict taboos that you'll want to be aware of. What particular taboos might you have violated if you had not taken time to investigate the cultural differences between your country and the foreign country?

5. How should you dress to make the best impression possible in the foreign country that interests you?
6. Identify the religious and political ideologies you would be most likely to find in the country you are researching. How do these ideologies resemble or differ from your own? How will you avoid possible difficulties in these areas?
7. If you are an American citizen, how might you be regarded in the country of interest to you? Investigate current perceptions about America held in that country. If these perceptions are negative, how do you plan to present yourself positively?
8. Compile a list of slang and idioms that might be misinterpreted by a foreign businessperson with limited English skills.
9. Identify part of your town, city, state, or region where intercultural differences may influence how business is conducted. Describe in writing the kind of adjustments you would make if you were doing business in this locale.
10. Reflect on your own travel experiences inside or outside the U.S. In what areas would you be most comfortable doing business? In which areas least comfortable? Why? Write your responses to these questions.
11. Create two dialogues between businesspeople of differing cultures. In the first dialogue, demonstrate successful intercultural communication. In the second, show the symptoms and results of cultural insensitivity.
12. Watch a foreign film. Keep track of the cultural differences that occur in the eleven areas of cultural sensitivity described in this chapter.
13. Interview a businessperson or some other associate who has lived abroad or in a cultural area of this country that differs from your own culture. Determine how your interviewee made intercultural adjustments. How successful were these adjustments? What would the person do differently now?

BEST COPY AVAILABLE

Chapter 20

Communication for Intercultural Business

True/False Questions Quiz C

___ 1. Speaking English loudly ensures that foreign listeners will understand.

___ 2. Speaking English slowly helps foreign listeners understand.

___ 3. A smile on the face of the foreign listener is the universal sign of understanding and approval.

___ 4. The feelings and values of a foreign client may be as important to negotiations as his or her knowledge of the field or project at hand.

___ 5. Only those planning to work abroad need training in intercultural business skills.

___ 6. You can count on foreign businesspeople to ask for clarification if they do not understand you.

___ 7. Those who speak only a little English nevertheless can be expected to know most of the colloquialisms of the language.

___ 8. Foreign embassies can provide little information on business abroad, since they are concerned primarily with visas.

___ 9. Logical, linear thought is necessary for the successful transaction of business anywhere in the world.

___ 10. Most embassies have a commercial secretary responsible for dealing with trade relations.

Chapter 20

Communication for Intercultural Business

Essay Questions

Note: Students should answer the following questions on their own paper.

1. What options do businesspeople have who seek training in intercultural business communication and practice?

2. To what degree should American businesspeople try to imitate the customs, dress, and mores of foreign cultures they visit? Discuss your answer.

3. In what ways can an American businessperson help foreign speakers of English maximize their comprehension?

4. In what ways can foreign embassies be useful to American businesspeople preparing for foreign travel and service?

5. Discuss the idea of a "global village" insofar as it influences business communication.

6. Is there a "correct" way to conduct business, no matter what the culture? Discuss your answer.

7. What is an "idiom?" Provide an example. How should it be used in intercultural communication?

8. Even if your foreign hosts speak English, should you make the effort to learn some phrases in their language? Explain your response.

9. What is the difference between "intercultural" and "international" business?

10. List five typical areas of cultural sensitivity.

11. Discuss this assertion: "Verbal customs vary from culture to culture, but non-verbal gestures do not."

12. In what ways can an American business writer or speaker gain an advantage from knowing how foreign business documents and presentations are organized and formatted?

13. Comment on this assertion: "Only those planning to work abroad need inter-cultural business training."

14. Discuss three common myths about other cultures in relation to our own.

15. How do signs of approval and disapproval differ from culture to culture?

Communication for Intercultural Business

Before Reading ❶

The ideas which came into your head can't be predicted here, but for comparison's sake, here's another person's brainstorming:

free-trade agreement with Mexico
disputes about minority contracts at Fair Park
a local woman has been trying to develop a business in Russia (3 yrs.)
communications across cultures can be tricky, meanings change
Chevrolet Nova, no va in Mexico

Before Reading ❷

Some of the major topics you might have seen include these:

- eleven areas of cultural sensitivity
- adjustments in written and spoken English
- training
- the importance of intercultural business relations

During Reading

The following example of notes on the "Eleven Areas of Multicultural Misunderstanding" won't look exactly like yours, but they might help you think whether you're taking too many or too few notes.

If it seems important to memorize an eleven-item list, you'll need to go beyond the point where you know what each item means. In addition, you'll need a method for rehearsing the whole list. You might be able to break the list into shorter groups, and review all the groups. You might even try a mnemonic device such as a "silly sentence" in which the first letter of each word reminds you of an item on the list. But be careful, nonsense is the first thing to go when you're anxious. Understanding and repetition are the most reliable memory techniques.

Eleven Common Areas of Intercultural Misunderstanding

Each of these American businesspeople initially reacted with shock: "Well, how was I supposed to know?" Avoid asking yourself the same question. Don't attempt to interact in a new culture before becoming aware of your own assumptions and blind spots. The following 11 questions relate to areas of cultural sensitivity around the world. The more you know about another culture, the harder you may find it to answer each of these questions. That's as it should be. Simple answers to complex questions can lead to stereotypes, the enemy of intercultural awareness.

The 11 areas of sensitivity are male–female interactions, respect, time and space, taboos, commitments, nonverbal cues, language and translation, dress, methods of persuasion, religious and political issues, and prejudices.

1. ♂ v. ♀ grnd. rules
2. Resp. signs? who?
3. T.& Sp. punct? dist?
4. Tbo. alcohol jokes
5. Com. signs yes & no

1. How do *men* relate to *women*, and women to men? Though you may not agree on the fairness of relations between the sexes in other cultures, knowing their ground rules helps you avoid disastrous social and business pitfalls.
2. How does the culture indicate *respect*? Consider the roles of silence, direct questions, seating arrangements (such as the infamous seating struggles before the Vietnamese peace talks), eye contact, gestures, gifts, compliments, and invitations. Also, find out whether specific categories of people (e.g., older persons, religious figures, more-senior staff) always receive some of these specific signs of respect.
3. How does the culture view human *time and space*? Does an appointment at 7 p.m. mean "7 sharp" or "sevenish" or, as in some Latin countries, around 8? Is one business day, once passed, gone forever (the American notion of linear time), or does the same circumstance repeat itself over and over (the Eastern cyclical view of time)? What of space? Should you stand a bit closer to Frenchmen than you are used to standing to Americans?
4. What are strict *taboos* in the culture? Is alcohol, for example, accepted, winked at, or absolutely unthinkable? Is your host's off-color joke an invitation for uproarious laughter or a subtle test of your own mores?
5. How are business *commitments* made in the culture? By oral approval? By a handshake? By signing of documents? Often American businesspeople believe that a verbal agreement shows that the listener agrees to the proposal and is committed to it. When they discover that their hosts are merely being pleasant and agreeable, they feel deeply disappointed and may even feel cheated. Try to establish in advance the words and actions in the culture that will let you know that your deal is moving forward to commitment. Try also to find out how people say "no" or avoid saying "no" in the particular culture.

6. N-V. C.
signs
gestures

7. L & T.
learn?
whose trans?

8. D
"native"
v.
own ID.

9. Pers.
direct?
rat'l or
trust?

10. Rel. or Pol.
worship
holidays

11. Prej.
neg. U.S.
stereotypes

6. What *nonverbal cues* are used in the culture to pass information to you, or to pass private understandings between members of the culture? How should you interpret the "V" sign in England? (Sometimes an obscene gesture.) How are you to understand an apology delivered with a big smile in Japan? (Utter sincerity, not a charade.) What does the eye pull mean in Italy and Spain? (Careful, I'm on to you.) Why does your host in India grimace when, in crossing your legs, you point your soles toward him or her? (An insult.)

7. How should you handle the whole matter of *language and translation*? It bears looking into before entering upon business relations in another culture. What words can you learn to indicate your interest in another culture? Should you supply your own translator? Will he or she be trusted? What should you conclude if your host insists on providing his or her own translator for you?

8. How should you *dress* for business and social occasions in the host country? Before "going native" in dress, consider the risks of losing your identity as a foreign visitor and hence your immunity to some forms of criticism. In our own country, no one expects the visitor wearing Tibetan ceremonial gowns to cope well with cabs, train schedules, and all the other hassles of urban life. We bend to help. However, the same visitor in typical American street clothes may be treated with irritation and impatience. Similarly, your clear identification as an American abroad may bring a modicum of helpfulness from the host country.

9. How do your foreign hosts handle *persuasion*? Do your hosts favor direct propositions supported by evidence? Do they wish to consider your reputation, your family roots, your personal success, your age, your sex, your educational attainments? Do they want to hear your arguments or merely to share your friendship? Do they base a business relation on rational analysis or on trust?

10. What aspects of the host country's *religious or political life* must be understood for effective business relations? Are certain times of the day set aside for worship, not work? Is work automatically canceled on some holidays, or is it optional? Must certain work groups be separated due to political differences? Are some jobs tasks disliked for religious or political reasons?

11. What *prejudices* against you as an American must you overcome in the culture? Do your hosts automatically assume that you throw money around in a careless and tasteless way? Do they assume that your appetites for food, alcohol and sex are out of control? Do they look upon you as a steam-roller, who believes that might makes right? In all these matters, you may have to exert your imagination and energies to show yourself as you are, not as you are thought to be.

BEST COPY AVAILABLE

After Reading ❶

If you disagree with an answer, look back at the text and talk your question over with another person. It's important to get new information stored accurately in your memory.

1. F
2. T
3. F
4. T
5. F
6. F
7. F
8. F
9. F
10. T

After Reading ❷

Questions 1, 3, 10, 12, and 13 seem to be related to major topics without being too broad.

Questions about specifics in the chapter include 2, 4, 7, 11, and 15.

The broadest questions are 5, 6, 8, 9, and 14; they might not appear on the exam because they could be answered from general knowledge, rather than from the information contained in the chapter.

After Reading ❸

Do you agree with these answers?

1. C
2. D
3. E
4. A
5. B

As for your essay response, did you incorporate these organizational techniques?

1. A first sentence that rephrases and responds to the question.

   For example, your paragraph might have started out by saying something like *"There is ample evidence to disagree with the assertion that 'only those planning to work abroad need intercultural business training.'"*

2. Structuring the body of your response to provide specific support for that thesis. At least two forms of support are needed, along with specific details to make your ideas vivid and clear.

   For instance, you might have mentioned the many cultural groups within most U.S. companies, as the example in the introductory paragraph of the chapter did.

   You might have mentioned the increase in multinational business, increasing competition from foreign businesses, and the impact of communications technology in making the world a "global village," as the last paragraph of the textbook did.

   You might offer a personal example.

3. Finally, your paragraph should conclude with a re-statement of the main idea or an implication of it.

   For example, you might have said something like *"Thus, almost everyone working in the U.S. feels the impact of various cultures, whether foreign or local; and intercultural business training will help us to communicate effectively with clients and competitors from a wide range of cultural backgrounds."*

Expediting Treaties and Hostage Releases

Purpose for Reading

The subtitle of this article reveals why it might be assigned as outside reading in an office technology course: "It's All in a Day's Work for the Foreign Service Secretary." Although some people entering the secretarial field may be looking for routine and security, others may feel some regret at not choosing a more dramatic career. This article would probably be recommended by an instructor wanting students to get a broader idea of possibilities for secretarial careers.

Although the article would be assigned primarily for fun, the content presents so much information about the actual day-to-day duties of a secretary that it would be reasonable to expect at least an essay question over the article on the unit exam.

Curtain, Marlene. "Expediting Treaties and Hostage Releases: It's All in A Day's Work for the Foreign Service Secretary." The Secretary. May 1992: 8-10.

Before Reading ❶

Look through the three pages of this article to get an overview of the topics and organization. By all means, look at the pictures, too. Your goal is to get a general idea of what you will be reading. Spend about a minute.

As the author says in her introductory paragraph, she has lived in nine countries on four continents during her foreign service career. Although it's certainly possible to read the article without knowing any geography, you'll get more out of it if you can at least place the countries on their continents.

Match these countries with the areas in which they're located:

☐	Chad	1. Africa
☐	Dominican Republic	
☐	Ivory Coast	2. Asia
☐	Laos	
☐	Taiwan	3. Central America
☐	Colombia	
☐	Costa Rica	4. South America
☐	Honduras	

If you aren't sure or don't know some of these, at least you're aware of that now! See if you can pick up additional information when you read the article.

Before Reading ❷

How does the article sound so far?

Does the idea of "travel to exotic countries" appeal to you?

If so, great, but don't forget that your purpose will be to get information which an office technology instructor might ask on an exam.

If not, your reading task may be a little harder, because you have to get information which an office technology instructor might ask on an exam from an article which doesn't look appealing. Good luck!

During Reading

When you're ready to begin reading this article, keep in mind that you will be tested over the material.

Hint: Look for information about the different kinds of tasks performed during this secretary's career. It would save time to underline or take separate notes on the tasks.

After Reading

❶ Is there anything you want to change in your answers to the matching question about countries and their continents?

When you've done your best, check with the **Answer Key**.

After Reading

❷ How many different kinds of tasks did you find?

Can you organize the information into two lists? On the left, put tasks which seem "traditional" for secretaries. On the right, put the "non-traditional" tasks.

Traditional	**Non-Traditional**

After Reading

❸ Now that you've read the article and had a chance to review some of the content which relates to secretarial careers, your next task is to decide what to remember for the exam. Predicting test questions is a good way get ready to review for an exam.

Write three essay questions about this article which seem reasonable in view of the **Purpose for Reading** and the *Hint* you received.

1.

2.

3.

After Reading

❹ Choose the essay question which you think is the best from among those you wrote and those provided in the **Answer Key**.

Write a paragraph indicating which question you chose and why. Be sure to refer to the criteria for questions included in the **Answer Key** on page 2B-13.

Expediting Treaties and Hostage Releases

Curtain, Marlene. "Expediting Treaties and Hostage Releases: It's All in A Day's Work for the Foreign Service Secretary." The Secretary. May 1992: 8-10.

Reprinted with permission from the May 1992 issue of The Secretary. Copyrighted 1992 Professional Secretaries International.

For permission to reprint for classroom use, contact:
Ms. Eileen Warren
The Secretary
2800 Shirlington Road, Suite 706
Arlington, VA 22206
Phone: (703) 998-2534; FAX (703) 379-4561

Expediting Treaties and Hostage Releases

It's all in a day's work for the Foreign Service secretary.

By Marlene Curtain

A career in the secretarial field usually doesn't afford one the opportunity to travel to exotic countries, live and work in diverse cultural settings, or experience firsthand the lives of the people in those countries.

The Foreign Service, as part of the U.S. Department of State, has positions for secretaries who wish to spend the majority of their careers living and working overseas. The following two articles explore this exciting career path.

As a Foreign Service secretary, Marlene Curtain traveled throughout Central and South America and Africa. She's pictured here at a marketplace in Chad.

A secretarial career in the Foreign Service is more than just a job—it's a lifestyle. In my 18-year career, I have lived in nine countries on four continents. My experiences have expanded both my personal and professional horizons.

Marlene Curtain is the deputy registrar in the Office of the Registrar at the U.S. State Department.

Santo Domingo, The Dominican Republic

The world is changing at such a rapid pace that history is constantly being reshaped. This fact was certainly true when I was posted to the Dominican Republic. The Dominican people had just experienced a civil war and the country was devastated.

Santo Domingo, the capital city, was in shambles and public services were almost nonexistent. The American Embassy was the hub of activity—our mission was to help rebuild the country economically and to assist in re-establishing its political stability.

I was assigned to the political section of the embassy as a secretary and my duties varied daily. Situations kept changing, requiring me to work well under pressure. I had to type diplomatic notes quickly and accurately in both English and Spanish, respond to the needs of the many visitors to the sec-

BEST COPY AVAILABLE

tion from the diplomatic corps, and assist in hosting functions for government officials, prominent local businessmen, and other agency representatives.

It required strong organizational skills to ensure that all background materials accompanied the voluminous correspondence that came in from all over the world. Despite my hectic work schedule, I was able to enjoy the wonderful climate, beautiful beaches, and the warmth of the Dominican people.

I met many new friends, some of whom are still very much a part of my life. I also married a fellow Foreign Service employee at a chapel on that wonderful island. The Dominican Republic was the foundation on which I would build my life as a Foreign Service professional.

Ft. Lamy, Chad

After leaving the Dominican Republic, I took a leave of absence and moved to Ft. Lamy, Chad, in central Africa with my husband where I was able to find part-time employment. My duties ranged from taking inventory at the ambassador's residence to being the secretary at the United States Information Agency (USIA) when the regular secretary left on emergency leave.

It was quite a personal challenge to shift from a political focus back to an American cultural setting. At USIA, I assisted in the library by fulfilling requests for movies, cataloguing books, and working as the all-around "girl Friday" during book fairs.

The following year I flew from Ft. Lamy, which did not have a medical facility, to Frankfurt, Germany, to give birth to our son at the Army hospital there. We were fortunate to have an excellent roving medical physician, who had advised me to leave several weeks before the baby's due date for either the United States or Europe to ensure proper medical care when the baby was born.

Our son thrived in Chad. One of our most memorable experiences was the Chadian tenth-year independence celebration. A colorful parade moved slowly down the street. Camels and elephants were gaily decorated, the long robes of sheiks bellowed in the wind as they danced to the music of flutes, tribesmen were mounted atop handsome stallions, and women dressed in blue robes were chirping like birds.

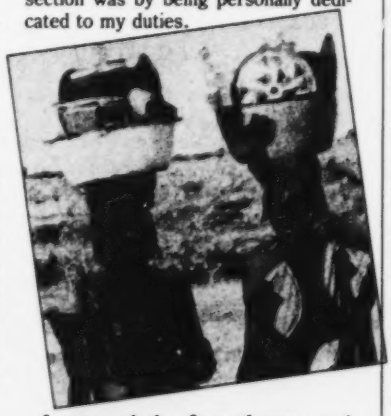
During the next six years, we transferred to Abidjan, the Ivory Coast; Vientiane, Laos; and Taipei, Tawian. I took care of our son and enjoyed the challenges of living in each new country.

Bogota, Colombia

Our next country was Bogota, Colombia, where I resumed my foreign service career. My posting as the American secretary to the consular section at the U.S. Embassy proved to be an extremely interesting assignment. I had the opportunity to learn a lot about the country as I assisted in responding to questions about visas, passports, and immigration law.

After a year I was reassigned to the political section, which proved to be more than just a challenge. At the time, the section was undergoing a complete personnel overhaul. Before long, I became the "institutional memory" of the section.

My secretarial skills were stretched to the max during the eight months I was the sole secretary in what had been a two-secretary office. I had the responsibility for handling the workload of four productive officers and the only way to get the job done in this high-powered section was by being personally dedicated to my duties.



I managed the flow of paper and typed a variety of correspondence (some in Spanish). I constantly adjusted priorities based on my grasp of the current local political situation and knowledge of the importance of each officer's project. I also analyzed biographic information and prepared background notes for the ambassador.

CAREER PATHS

The Foreign Service Wants You!

To qualify as a Foreign Service secretary applicant, you must be a U.S. citizen, 21 years old at the time of appointment, have two-to-three years of recent secretarial experience (students enrolled in secretarial programs at two-year accredited schools may apply after successful completion of their first school year), type 60 wpm, possess word processing experience, and be able to pass a rigorous medical examination and background security investigation.

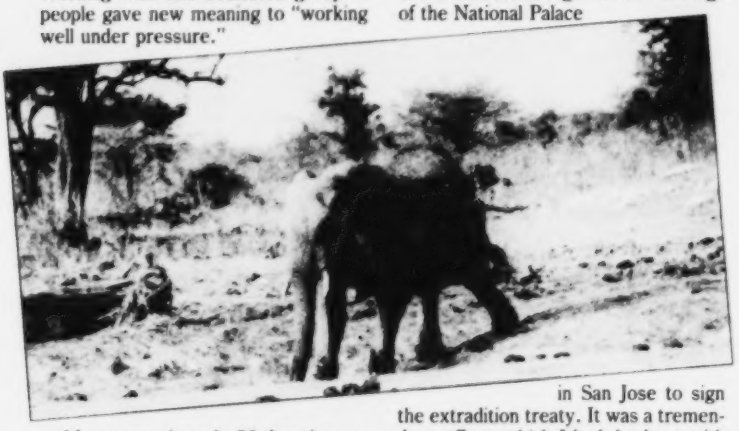
Besides basic benefits—group life insurance and health benefits programs, annual and sick leave, and so forth—foreign service secretaries serving overseas receive numerous additional benefits:

- quarters or housing allowance;
- cost of living allowance, where the cost of living is substantially higher than in Washington, D.C.;
- salary differential, which is taxable, ranging from 10 percent to 25 percent of base pay where there are unusual hardships;
- rest and recuperation leave, with transportation paid, for employees and dependents assigned to designated hardship posts;
- educational allowance for dependents under certain circumstances;
- coverage for certain medical expenses of employees and dependents; and
- travel expenses of employees and their authorized dependents, including shipment of personal effects, to and from posts abroad.

Entry salaries for Foreign Service secretaries range from $20,503 to $25,814. Persons interested in more information about employment with the Foreign Service should write to: Vicki Eckman Marquez, PER/REE/EXAM/BEX, U.S. Department of State, P.O. Box 9317, Arlington, VA 22219.

The American Embassy in Bogota was also the test post for the State Department's new filing system, so I had to establish, implement, and maintain more than 500 files crucial to the smooth operation of the section.

During this same period of time, the American Ambassador was taken hostage and I served on a special task force that negotiated his eventual release. Working with this dedicated group of people gave new meaning to "working well under pressure."



After approximately 56 days in captivity, the ambassador was finally released. It was an extremely rewarding experience to be part of such a dedicated team.

San Jose, Costa Rica

With the crisis then engulfing Central America, San Jose had become an important player in the scheme of U.S. interests. During my two-year tour as secretary to the political section, the U.S. embassy hosted the President of the United States, a major conference of foreign ministers, several congressional delegations, and countless other influential visitors.

I became a one-woman travel agency—booking appointments, scheduling transportation (mainly air), and reserving hotel accommodations. I also often managed the office and took the initiative in solving problems in the absence of the political counselor.

For example, the political section coordinated extradition treaty negotiations with the Costa Rican government and worked closely with the State Department's office of the legal advisor in Washington, D.C. I responded to inquiries about amendments and generally fielded questions concerning the draft treaty.

As the following example illustrates, protocol work is extremely detailed: A few days before the signing of the treaty, I was given exact instructions on how to tie the ribbon binding the book that contained the treaty.

Finally, the day arrived when President Reagan and President Monge of Costa Rica stood together on the stage of the National Palace in San Jose to sign the extradition treaty. It was a tremendous effort, which I look back on with considerable professional pride.

Tegucigalpa, Honduras

At the American Embassy in Tegucigalpa, I was first assigned as secretary to the economic section. Six months later I was reassigned as secretary to the deputy chief of the embassy or mission and spent my final year as the ambassador's secretary. As the ambassador's secretary, I established his daily priorities and set the overall tone for the mission's daily routine.

One of the duties that I especially enjoyed was coordinating arrangements for a luncheon or dinner. I had to first check the ambassador's calendar to ensure there were no scheduling conflicts before compiling a guest list. After I determined that the guest of honor would be available, I extended telephone invitations to the other invited guests. Once invitations were accepted, I prepared a final guest list and sent "pour memoires" or reminders—the same as invitations except that they are used after everyone has accepted.

Determining the seating for such receptions was an involved affair. I relied upon "Social Usage Abroad," a reference detailing correct arrangements of tables, and referred to a "list of precedence" for local officials to ensure that guest lists were in the correct "order of protocol." Place cards had to be written out in black ink only and then placed on the appropriate tables. I would occasionally attend these functions and assist the ambassador and his spouse in entertaining their guests.

Washington, D.C.

Now, back in the United States, I've had the privilege to work for the undersecretary for economic affairs. Everything that I had learned in previous assignments was necessary to perform efficiently at this posting.

Last year, I was assigned to an administrative position in the office of recruitment, examinations, and employment. My responsibilities include maintaining a computerized tracking system of career candidates as they pass through the pre-employment stages. Once they have completed all the prerequisites, candidates are placed on a rank-order register. I then make an offer to these candidates to join the Foreign Service when openings occur.

Even though I continue to be stimulated professionally in my work at the U.S. State Department, I miss the exposure to new cultures that I had experienced abroad, so sometime this year I'll request an assignment as the top secretary in a foreign post.

My career in the Foreign Service has been extremely rewarding. I've received several promotions and two awards, one for five years of "sustained superior performance" while serving overseas and one for a "superlative contribution" to a special project.

The best rewards, however, have come from job satisfaction and the pleasure of working with such wonderful people.

Working for the Foreign Service has given me the opportunity to experience the flavor of different countries and the generosity of people from all over the world. We were able to build a relationship based on mutual respect and enjoyed sharing in each other's culture.

I learned that even though we seemed different, unconditional acceptance brought us together and made us the same. It has been and continues to be a privilege for me to have represented my country abroad. ■

Expediting Treaties and Hostage Releases

After Reading ❶

[1]	Chad	1. Africa
[3]	Dominican Republic	
[1]	Ivory Coast	2. Asia
[2]	Laos	
[2]	Taiwan	3. Central America
[4]	Colombia	
[3]	Costa Rica	4. South America
[3]	Honduras	

How many of these countries could you locate on a map?

After Reading

❷ Although deciding where to put each task in is a matter of your personal experience (and sense of humor), your lists will probably have many of these items.

Traditional	Non-Traditional
type notes quickly and accurately	type in Spanish
organizational skills with correspondence	respond to visitors' needs
respond to questions	library assistant
act as "institutional memory"	negotiate hostage release
handle workload of two singlehandedly	facilitate treaty negotiations
manage paper flow	tie ribbon to specifications
adjust priorities based on local politics	
prepare background notes	
establish, implement, and maintain files	
arrange travel	
manage office	
establish boss's daily priorities	
set overall tone for office	
coordinate social events according to protocol	
maintain a computerized tracking system	

After Reading ❸

How did you fare with this assignment? Maybe it gave you a little sympathy for your instructors!

Write three essay questions about this article which seem reasonable in view of the **Purpose for Reading** and the *Hint* you received.

Criteria for Good Essay Questions

Good questions are neither too broad nor too narrow to be answered on the basis of a careful reading of the material.

For example, a question that reads "Describe the duties of a secretary in the Foreign Service" is too broad. Even if you could be expected to recall and write down everything Curtain wrote, you would need information from more than one source to do justice to the question.

A question which asks "What did the author do in Tegucigalpa?" is too narrow. Unless you're studying Honduran secretarial challenges, you don't need to remember exactly where she did each task.

A question which is just about right would ask for you to remember and, perhaps, analyze a significant part of the article.

Do you agree that these questions meet those criteria?

1. Describe and give examples of the secretarial tasks which were uniquely related to Curtain's foreign service career.

2. Despite the fact that she worked in exotic locations, Curtain performed many tasks that any secretary would be expected to do. Describe and give examples of at least five such tasks.

3. What does Curtain see as the rewards for her career in the foreign service? Would you be interested in a similar career?

Do Women Make Better Managers? and *Pride and Prejudice*

Purpose for Reading

The following two articles might be among several assigned to prepare for a class discussion of stereotyping and its effect on careers in office technology. The article from Working Woman examines questions about women as managers, and the Via FedEx article presents the reactions of male secretaries to the stereotypes they encounter.

Although your personal opinion will be important in thinking about and discussing the articles, keeping your opinions separate from the authors' is a big help when reading. Otherwise, you may not get an accurate impression of the articles. Thus, your purpose will be to read each article without bias in order to understand which ideas from your reading can be used to support or change ideas which you previously held.

Billard, Mary. "Do Women Make Better Managers?" Working Woman. March 1992: 68-71, 106-107.

Froiland, Paul. "Pride and Prejudice." Via FedEx. Fall 1992: 18-19.

Before Reading ❶

Before you read the first article, "Do Women Make Better Managers?" you'll need to be clear about your own answer to the question posed by the author.

What do you think? Do women make better managers? Explain your response here:

Before Reading ❷

If you haven't yet previewed "Do Women Make Better Managers?," do so now.

Look at the

- title and subtitle
- pictures and their captions
- headings
- author's introduction and conclusion

in order to answer the following question:

What seems to be the *author's* answer to the question "Do women make better managers?"

Write your response here:

During Reading

Read the article, keeping in mind that you will use the author's ideas and facts to support your own position.

Ask yourself at the end of each section what the author's main idea in that section was.

After Reading

❶ Writing down ideas gained from reading helps you clarify meaning while it provides notes for review.

Write a sentence (or two, if you must) summarizing the main idea in each of the four sections of the article:

1. Introduction (Paragraphs 1-9):

2. DAMN THE HIERARCHIES

3. THE TEST OF TOUGH TIMES

4. WHAT'S REALLY AT STAKE

After Reading ❷

There are several terms used in this article that may be new to you. In the case of "transformational leadership," the author felt that the term might be new to many readers, and so she provided a definition. In the case of "ghettoizing" or "command-and-control," the author left you on your own.

Write definitions of the following terms and phrases; make sure the definition relates to the ideas in this article. Some definitions can be found in the article, others will be in the dictionary, a few will be so new that you'll have to ask "experts" about the meaning:

altruism

command-and-control

decentralizing

empowerment

ghettoizing

interactive style

moot point

nurturer

participatory or participative style

quasi-militaristic

transformational leadership

webs rather than pyramid-shaped hierarchies

After Reading ❸

Now that you have had a chance to look carefully at Billard's article, how would you evaluate her own position on the question?

Is Billard neutral on the question "Do women make better managers?" Explain your response here:

Turn to the second article next, "Pride and Prejudice." See how successful you are at developing your own strategies *before, during,* and *after reading* following these general guidelines:

Before Reading

Think about your own attitudes towards men who are secretaries, then preview the article to get an idea of what the article covers.

During Reading

Read to get the author's ideas so that you can use the ones you like in support of your own position.

After Reading

Try summarizing the ideas in each of the three main sections of the article. Make sure of the definition of any new terms. Evaluate the author's position. Hold yourself responsible for the same level of understanding you achieved on the Billard article, even though you don't have all the questions and answers that were provided for that article.

After Reading

4 When you have read and become familiar with both articles equally, imagine yourself in the class discussion planned by your instructor to deal with issues of stereotyping in office careers. How would you respond to this comment from a classmate?

I don't care what anybody says, men have no business taking secretarial jobs away from women. They're not temperamentally suited for the work because their style is transactional and command-and-control. And besides, they'd never see a secretarial job as a career; it would just be a "fill-in" until they got a "real" job as an administrator.

When you've thought about what you'd say, write down the key points here:

Do Women Make Better Managers? and *Pride and Prejudice*

Billard, Mary. "Do Women Make Better Managers?"
Working Woman. March 1992: 68-71, 106-107.

Reprinted with permission of
Working Woman Magazine.
Copyright © 1992 by Working Woman, Inc.

For permission to reprint
for classroom use,
contact:
Ms. Karen Ann Sisko
Working Woman Magazine
230 Park Avenue
New York, NY 10169
Phone: (212) 551-9385; FAX 599-4764

Froiland, Paul. "Pride and Prejudice."
Via FedEx. Fall 1992: 18-19.

Reprinted by permission of
Via FedEx magazine, copyright 1992.

For permission to reprint
for classroom use,
contact:
Ms. Jodi Peterson
The Wells Group
430 1st Avenue North, Suite 550
Minneapolis, MN 55401-1735
Phone: (612) 338-8300; FAX (612) 338-7044

DO WOMEN MAKE BETTER MANAGERS?

Executives and academics are split. Some say women's interactive style is what works now. But critics warn that such stereotyping will only hurt women

by MARY BILLARD *photographs by* BRIAN SMALE

ROBIN ORR THINKS THE "ETHIC OF CARE" is a feminine concept. Whereas the medical profession traditionally approaches the body as a machine, Orr wants to bring intuition and personal relationships to hospital care. As national director of hospital projects at Planetree, a consumer health-care organization in San Francisco, she has designed a system that gives patients greater control in their treatments. They are allowed to read and write on their medical charts; nursing stations, the physical barrier between patients and care givers, have been banished; family members are encouraged to administer drugs, change bandage dressings and stay overnight in hospital rooms. "Here, sick people are empowered to work and get well," explains Orr.

An independent, nonprofit corporation, Planetree teams up with existing hospitals to create patient-centered services. Five hospitals have affiliated with the program since 1981, and Orr is consulting with at least 10 others interested in instituting the Planetree method. "We try not to seem like an outside force imposing our will to effect change," she says. "Many men make a mistake that leadership

Hospital projects director Robin Orr: "Even in a crisis situation, employees should be polled."

means control. Management is about inspiration and influence."

Orr's approach is at the center of an issue that is hotly debated these days by executives, academics and the media: Do women have a different management style than their male counterparts, and if so, do the consensus-building, participatory methods that are largely attributed to women work better than the hierarchical, quasi-militaristic models? The subject has become increasingly controversial and has in turn raised many more questions. Do participatory styles work in most corporate settings and situations? How does such a manager deal with the realities of increased competition and downsizing? And does labeling any style as distinctly female promote sexism and encourage stereotyping?

The theory that there is a style of management particular to women gained widespread attention in a 1990 article in the *Harvard Business Review* by Judy Rosener, professor of management at the University of California at Irvine. Entitled "Ways Women Lead," the piece argued that women are more likely than men to manage in an interactive style—encouraging participation, sharing power and information, and enhancing the self-worth of others. Rosener claimed that women tend to use "transformational" leadership, motivating others by transforming their self-interest into the goals of the organization, while men use "transactional" leadership, doling out rewards for good work and punishment for bad.

Rosener sent an eight-page questionnaire to all the members of the International Women's Forum, an association of women leaders, and asked each of the 465 respondents to supply the name of a man with similar responsibilities. She then sent the men the questionnaire, which asked, in part, about leadership style.

Rosener's findings immediately sparked a controversy and the letters in response to her article filled nine pages in the *Harvard Business Review*. Professor Cynthia Fuchs Epstein of the City University of New York criticized Rosener's decision to ask managers

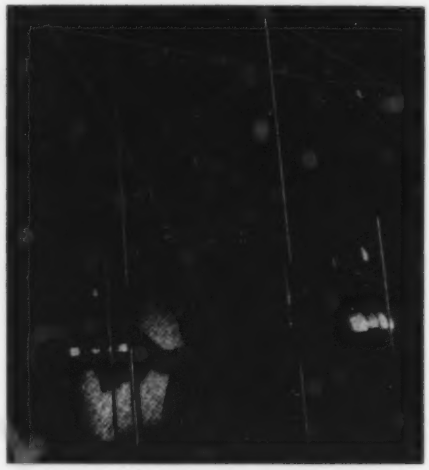
BEST COPY AVAILABLE

to describe their management style rather than observing the managers at work and drawing her own conclusions. She argued that much current research, hers included, shows that men and women tend to stereotype their own behavior according to cultural views of gender-appropriate behavior. Other letter writers supported Rosener's view. One was Bernard Bass, a professor of management at the State University of New York at Binghamton, who studied subordinates of both men and women managers. Like Rosener, Bass found that women bosses were more often described as possessing transformational leadership qualities.

As the idea of a women's style of management gained momentum, it plugged into a larger body of work outside the world of business management. Psychologist Carol Gilligan has been exploring how women's model of moral development differs from that of men. The recent book *Brain Sex* argues that men's and women's brains are biologically different, while sociolinguist Deborah Tannen, in her best-selling book, *You Just Don't Understand: Women and Men in Conversation*, persuasively shows how men and women communicate differently.

While advocates of these theories argue that women's strengths should be tapped—even celebrated—critics counter that any stereotyping by gender is a form of sexism, one that will only shackle women to their traditional role as nurturer. Replace the word "woman" with "black," they say, and most people would see racism. Susan Faludi, author of the critically acclaimed book *Backlash: The Undeclared War Against American Women*, is worried by the demarcations. "I'm really torn," she says. "I agree that the workplace needs to be transformed and humanized, but it makes me nervous when men are seen as being one way and women are seen as sugar and spice."

Dee Soder, president of the Endymion Company, which advises senior corporate executives on their managerial strengths and weaknesses, believes the distinctions are irrelevant. "I think there is a higher proportion of participative women managers than there is men," she says, "but the crossover is so high it is a moot point."



Ad exec Paula Forman: "Command-and-control isn't effective. I can't command creativity."

DAMN THE HIERARCHIES

Whether or not this management philosophy is distinctly female, a lot of women embrace it. Many say they feel relieved not to have to strain to become carbon copies of men in order to succeed in business. "When the idea was first discussed, I felt like I belonged—I wasn't a little crazy," says Barbara Grogan, founder and president of Western Industrial Contractors in Denver. Grogan started with $50,000 in 1982 and has built a thriving $6 million company. She credits her success to high levels of staff productivity. Her strategy: Flatten the corporate hierarchy and make sure that information flows freely to all staff members. Toward that end, she had Western's new 7,000-square-foot office building constructed without any doors. "I do not have six levels of staff," she says. "And I don't have any organizational chart. If I did, it would be flat."

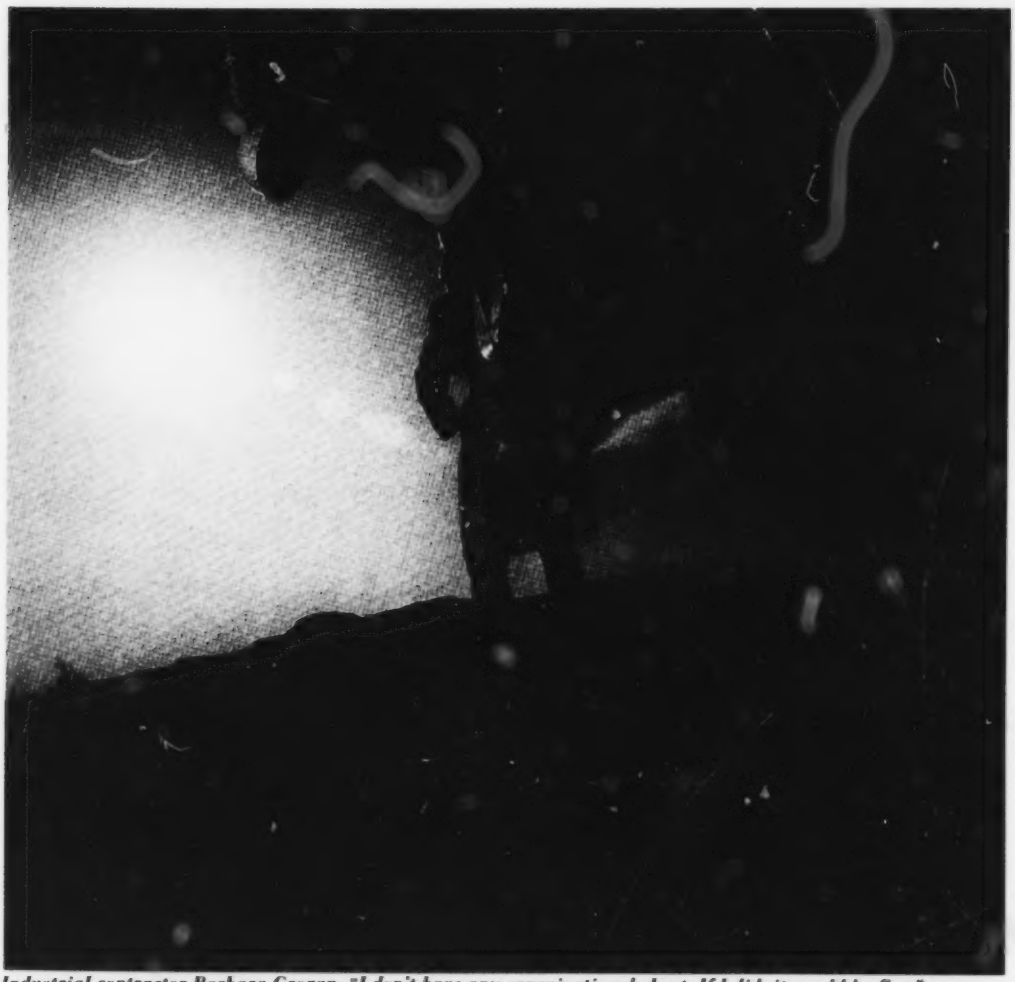
Grace Pastiak, director of manufacturing for a division of Tellabs, Inc., in Lisle, Ill., believes her participatory style of management has helped her meet her production targets 98 percent of the time (the industry standard is only 90 percent). Like Grogan, Pastiak advocates cutting out layers and making information widely available. She currently teaches a problem-solving class in which her student-employees have come up with suggestions that have saved the company $160,000. Pastiak, who oversees 200 people, has also eliminated a level of management and regularly rotates managers from production control to manufacturing to saleslike jobs in a factory. "It is more a cross-functional structure than a hierarchy," she says.

Perhaps the most successful example of this kinder, gentler style of management is that of Anita Roddick, owner of the Body Shop skin- and hair-care stores. The chain now has over 600 stores in 37 countries and, at the end of fiscal year 1991, reported pretax profits of $37 million on sales of $215 million. "It's just a family here," says Roddick. "We like to say, 'Partnerships, not power trips.' Even the language we use is feminine—things like 'gut feeling' and 'instinct.' " Roddick solicits information by rotating the board-of-directors meetings to different shops in order to meet with workers. "Every boss goes through a two-way assessment with workers," she says. "I even sit down with the tea lady. It is a breakdown of power—very feminine."

THE TEST OF TOUGH TIMES

As the recession and the realities of the '90s hit American businesses, the unexplored question is how well these participatory styles deal with layoffs and restructuring. Harvard Medical School psychologist Steven Berglas thinks the female style of leadership is better positioned for hard times. "In an era when the need to motivate is so important, women will do better because they are nurturers and value-driven," he says. "And at a time when the corporation needs restructuring, women will be able to do so because they operate in webs rather than pyramid-shaped hierarchies." But John Whitney, former president of Pathmark, who successfully turned around the ailing drugstore company in 1972, argues that there are times when participatory management just doesn't work. "If an organization is in crisis, it needs a period of authoritative management style," he says. "People will be dazed. They need someone to say, 'I'm going to take control.' " Whitney quotes Theodore Levitt, professor emeritus at Harvard, who says that effective leaders concentrate on producing consent, not seeking consensus.

Orr believes that even in a crisis situation "employees should be polled and talked to on a personal level." But when she needs to act quickly, she does take control. "Things move too fast sometimes, and decisions need to be made," she says. "You don't bother asking 15 people what they think." When the Denver economy went sour in 1987, Grogan had to cut employees. Although she consulted staffers about the cuts, she admits it was one instance



Industrial contractor Barbara Grogan: "I don't have any organizational chart. If I did, it would be flat."

when the buck stopped with her. "I tried to let people go with grace and dignity," she says. Grogan contends that she almost never has had to revert to a command-and-control plan. "If I did, it was because something was flawed in the previous decisions that had been made, and we reached a moment of crisis," she says. "Somehow, we had not had honest dialogue along the way."

Paula Forman, executive management director at Saatchi & Saatchi Advertising Worldwide in New York, is facing these decisions now, as the advertising business has fallen off dramatically. "Women learn the importance of relationships early on," she says. "But putting a value on intimacy isn't a luxury I give up when times get tough. I don't think command-and-control management is ever effective in this business. It's about creativity, and I can't command creativity."

Orr, Forman and the others have been successful, in part, because they work in organizations that are open to untraditional ideas and management techniques. As Rosener points out, only one of the women she interviewed for her article works in a traditional, large-scale company. "More typically, the women's organizations are medium-size and tend to have experienced fast growth and fast change," she writes.

What does that mean for the companies of the '90s? Mary Anne Devanna, associate dean of executive education at Columbia University Business School, believes women's styles are more consistent with the kinds of organizations that will be competitive in coming years. "Businesses experience cycles of decentralization and centralization," she says. "The '80s were a time of centralized decision making. Companies were working on rationalizing their portfolios, deciding what to buy and sell." At GE, she points out, the decision to sell Utah Mining and buy RCA was a centralized decision. "In the '90s companies are having to focus on raising productivity. *(Continued on page 106)*

BEST COPY AVAILABLE

Management Styles

(Continued from page 71) and that means involving the work force, decentralizing."

It's true. Even at GE, tough-guy CEO Jack Welch is breaking apart the executive power structure and passing responsibility down the ranks to "process champions," who might be executives, technicians or janitors. His much-heralded "work-out" and "best practices" programs seek to involve employees in decision making and to free the flow of information and ideas.

Welch has not made these changes out of any sense of altruism. He believes the move will raise productivity, which is necessary for staying competitive in the '90s—and he is not alone. There are plenty of male managers who use transformational management. Ralph Stayer, the owner of Johnsonville Sausage in Sheboygan Falls, Wis., has been a pioneer in running a company without a hierarchy. Since the early '80s his company's 500 employees have divided themselves into product teams, which decide on their coworkers' compensation, develop new product lines and fix goals. The company takes in more than $100 million a year, and since the changes were instituted in 1983, productivity has gone up 300 percent. This year Stayer reached the ultimate conclusion and abolished his job as president. "Now I consult for other companies," he says.

James Autry, former president of the magazine group at Meredith Corporation in Des Moines, also embraces participatory management. Last November he carried out a salary freeze at the company. "The traditional way would have been to make the decision and send out a memo," he says. "Instead, I started talking about such a possibility months beforehand. In meetings I would say, 'Hey, what do you think?' " Because they had been involved, Autry says, his employees supported the move. He also believes that women do "get it" quicker than men when it comes to employee empowerment. "Women think of themselves as affiliated with their people—men think of themselves as the boss," he says.

WHAT'S REALLY AT STAKE

The fiercest polarity on this issue is marked by those who wish to celebrate gender differences and those who are wary of such a move. Author Faludi is concerned about the implications of claiming a women's style of management. "It's a soothing message—no one has to change," she says. "Women can be Mommy, and men don't have to change." Anthropologist Louise Lamphere, a professor at the University of New Mexico who has studied women in the workplace, agrees. "Women may be embracing this idea because they are recognized as having something of value," she says. "Men can embrace it because it offers a way of dealing with women." The liability, according to Lamphere, is the potential for ghettoizing.

Supreme Court justice Sandra Day O'Connor echoed that concern in a lecture at New York University last year. "More and more writers have suggested that women practice law differently than men," she said. The early women lawyers had to fight the notion that they were too "compassionate, selfless, gentle, moral and pure . . . for adversarial litigation."

Others see no danger. "It is not 'betters' or 'worsers.' It is not a gender-limited thing. It is a question of what you lead with," says Saatchi's Forman. "I can be as tough as the men in my office, but I apply it differently, say it differently. Men and women can learn from each other." Sherry Suib Cohen, author of *Tender Power*, an early book on the subject, agrees: "It is the next stage to the feminist movement. It's not reactionary. It is that we no longer have to ape the male."

Whether it's a matter of gender or not, everyone involved in this debate agrees on one thing: It's time to expand the old management model. Global competition is changing the rules and norms of business. But as GE's Welch has said, "Change in the marketplace isn't something to fear; it's an opportunity to shuffle the deck." That doesn't mean throwing out all the old ideas. It means introducing some new ones—rocking the boat a little. The women and men exploring and defining transformational leadership are offering a vital and increasingly successful option for change. As a growing number of companies embrace these ideas, what's emerging is a more productive and humane workplace. And that's worth stirring up a little controversy. ■

Mary Billard writes on business issues

Lone voices in an overwhelmingly female profession, male secretaries react to the stereotypes.

PRIDE AND PR

BY PAUL FROILAND

When was the last time you saw a listing for a Guy Friday in the want ads? Since Robinson Crusoe's faithful assistant vacated the position, it very nearly has been the exclusive province of women. So you can imagine the response legal secretary Charles de Wynter gets when callers ask to be transferred to his boss's secretary and he answers. "I always answer, 'Charles de Wynter,'" he says. "A lot of times that's met with a silence. So I'll say, 'Hello,' and they'll say, 'I was calling for Mr. Marvin's secretary.' Then I'll say, 'You have him,' or 'I am his legal secretary.' More silence.

"I find that funny."

De Wynter, who works for the law firm of Watson, Ess, Marshall & Enggas in Kansas City, Mo., is a statistic in an overwhelmingly female profession, one of the trailblazing 1 percent of men to choose the field of office support. Except for the mailroom, where it's not unusual to find male administrators, it is rarer to find men in office support than even nursing, which had 5.2 percent men in 1992, according to the U.S. Bureau of Labor Statistics.

A legal secretary for 30 years, de Wynter finds himself confronting stereotypes almost daily.

"There seems to be a general conception that I am paid more because I am a man, and if I work for men I get a better deal," he says. He also finds that some administrators have trouble using the word secretary when referring to him. He's taken some ribbing, too. He recounts one Secretaries' Day when a radio disk jockey interviewed him on the air and asked whether de Wynter, who worked for a female boss at the time, sat on her lap to take dictation.

A secretary for 18 years, Michael E. Walker followed in his mother's footsteps.

BIAS IN THE BUSINESS

As director of admissions at the Executive Secretarial School in Dallas, Ray Meyer has watched students pass through his doors for 32 years. All it would take to erase the lopsidedness of the profession, he says, is for companies to change their habits and start hiring male secretaries. "Training them isn't the problem," he says. "It's more difficult for them to get a job." His current class of 450 has four male enrollees, but Meyer thinks it is more happenstance than trend; a man he graduated earlier this year was his first in five years.

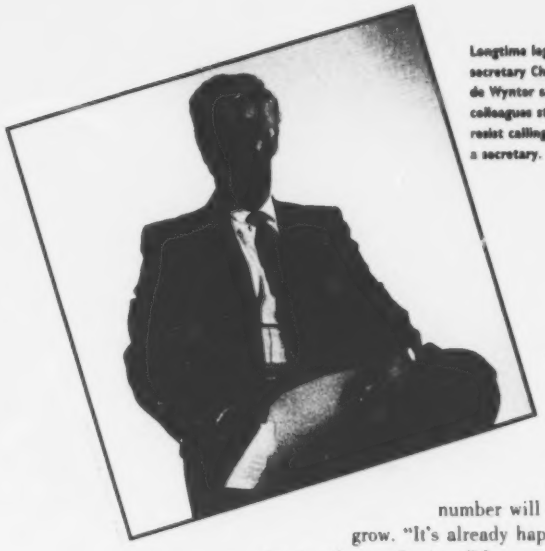
Mike Petitjean, CPS, who spent nine years as an administrative secretary for the Santa Fe Railroad in Emporia and Newton, Kan., found that men simply had problems with the idea of other men being secretaries. "When I said I was a secretary," he says, "some men would be comfortable with it, but many men would say, 'Well, you're really an assistant,' or 'You're really a low-level manager.' And I'd say, 'No, I answer the phones; I set up meetings; I take dictation; I put together reports. I'm a secretary.' Many of them had a stereotype about secretaries. There's a lot more work to the job than many people realize."

Chuck Barragan is an administrative assistant in human resources for the law firm of Feldman, Waldman & Kline in San Francisco. Although he finds himself enormously outnumbered at professional secretarial functions, he feels accepted by his female counterparts. "They find it interesting that a man is doing this sort of work, but there's nothing negative," he says. "Instead, they show a little surprise and comment that it's kind of neat."

A DIFFERENT DRUMMER

Slowly, the world may be coming around, too. "When I first started 18 years ago," says Michael E. Walker, an assistant to the program liaison specialist with the U.S. Public Health Service in Dallas, "people would say, 'Why would a man want to be a secretary?' But I don't hear those comments anymore."

Walker, who was encouraged in his career path by his mother, an executive secretary, says he's seen more men in the support field in the last eight to 10 years. De Wynter predicts



Longtime legal secretary Charles de Wyntor says colleagues still resist calling him a secretary.

One Secretaries' Day, a disk jockey asked Charles de Wynter, who had a female boss at the time, whether he sat on her lap to take dictation.

that number will only grow. "It's already happening in other professions," he says. "In most law firms, it doesn't matter so much what sex you are as what you can do."

The economy may be spurring a change in old images as well. Charles Euston, who manages support services for Aon Reinsurance Agency in Chicago, is in a position to make hiring decisions for his department. He counts three men and three women on his staff.

"I'm getting more male applicants because of the high unemployment rate," he says. "Men seem to be more willing to do this sort of work because they want work." Even so, he acknowledges, "The men I interview will sometimes think that what they're asked to do is menial because it's not viewed as 'man work.' It's viewed as 'woman work.'"

"Considering how bad the recession is," says Barragan, "any position now will be considered by any gender."

Joel Williams was trying to earn a living as a drummer in the musician-sotted city of Memphis, Tenn., several years ago when his mother made him a gift of a word-processing course. He passed with "flying colors," he says, and has worked since 1987 as a secretary at hospitality giant Promus Companies in Memphis.

The copying, filing and typing that's now his stock in trade is nothing new to Williams, however: He had been a clerk/typist in the Army. No one took notice of his gender then, he says, and no one gives it a second thought now, either. No one, that is, except his fellow musicians, "but I don't expect them to understand." ❑

Secretary Joel Williams began his career as a clerk/typist in the Army.

EJUDICE

Do Women Make Better Managers? and *Pride and Prejudice*

Before Reading

1 Whether you think women do or don't make better managers is fine. Even thinking that men and women make equally good or bad managers is fine. Having no opinion about the issue isn't so fine. It may mean that you aren't interested in the topic, and that can affect your motivation as well as your understanding.

Some tactics which can help you get interested in reading include

- gaining more information through a preview
- doing a freewriting/brainstorm on the topic of "why I'm not interested"
- talking to someone about the topic

If you didn't have an opinion about the article's title, try one of the above suggestions or think up one of your own. DO SOMETHING to help yourself get interested.

If you had a *strong* feeling that women do (or don't) make better managers, your challenge is to keep an open mind while reading so that you can see the author's ideas clearly.

To read with a sense of neutrality or fair play, try one of these ideas:

- previewing for points of agreement or disagreement with the author
- doing a freewriting/brainstorm on "what this author will say if she agrees with me"
- talking to someone who has a different opinion about the topic

If you had a *strong* feeling about the topic, use one of these suggestions in order to read fairly in spite of your bias.

Before Reading ❷

Did you get the impression that the author is neutral in her approach? The subtitle seems to offer information from two sides of the debate. The final heading and the concluding paragraph place the emphasis on a new management model rather than focusing on management as a "matter of gender."

If you had really strong feelings of your own, you may be disappointed with the author's position. But you may also be relieved not to have to read a strongly controversial article. On the other hand, reading a balanced article may make it more challenging to pull out "evidence" which you could use to support your position in a class discussion.

After Reading

1 Compare your summaries with these:

1. Introduction (Paragraphs 1-9):

   According to Billard, Rosener's Harvard Business Review article is the focus of a controversy over whether women have a particular management style which is "interactive" and "transformational" rather than the "transactional" style of men.

   (Did you include the specifics such as Robin Orr's leadership at Planetree, Carol Fuchs Epstein's criticism of Rosener, or the related works Brain Sex, You Just Don't Understand, or Backlash? If so, it was probably hard for you to keep to the one-sentence summary. The specifics should wait.)

2. DAMN THE HIERARCHIES

   In this section, Billard refers to women whose management practices do reflect the styles mentioned by Rosener: flattened hierarchies, participatory management, and partnerships rather than power trips.

   (Since there were only three people/companies cited in this section, it was harder to decide whether to include them. What did you do about the names of Grogan at Western Industrial Contractors, Pastiak of Tellabs, and Roddick of Body Shop?)

3. THE TEST OF TOUGH TIMES

   Billard answers questions of whether women's management styles will work in hard economic times with examples of several successful women—and men—who do use participatory rather than "command-and-control" approaches.

   (This section was longer and covered more ideas. Did you draw a different conclusion about her main idea here?)

4. WHAT'S REALLY AT STAKE

   According to Billard, some are reluctant to attribute these management differences to gender because it might lead to more stereotyping of women; the primary issue is making companies more competitive in a world-wide economy, and anything that helps is welcome.

After Reading

❷ Except for the definitions found in the article, yours will differ slightly. Big differences between your answer and this ***Answer Key*** may mean you didn't select the meaning closest to the way the word was used by Billard.

altruism
unselfish concern for the welfare of others

command-and-control
a term used in recent U.S. troop involvement with U.N.-sponsored military action. As used in this article, it contrasts with participatory management and suggests a style similar to the military where orders are obeyed without question

decentralizing
to distribute administrative power throughout an organization

empowerment
endowing with power or a sense of authority

ghettoizing
segregating

interactive style
Billard offers this definition in the right-hand column on page 69: "encouraging participation, sharing power and information, and enhancing the self-worth of others"

quasi-militaristic
the prefix "quasi" means resembling, similar to

moot point
debatable, of no practical value, academic

nurturer
someone who feeds, protects, supports and encourages

participatory or participative style
sharing, allowing others to take part

transformational leadership
Billard provides this definition, also on page 69: "motivating others by transforming their self-interest into the goals of the organization while men use 'transactional' leadership, doling out rewards for good work and punishment for bad"

webs rather than pyramid-shaped hierarchies
An interlinked, unranked network rather than a ranked system which has few leaders and many followers

After Reading ❸

Compare your response with this one:

At first I thought that Billard was presenting both sides of this issue equally, but after a closer reading, I'm not so sure. She doesn't really include comments from those who believe that women make ***worse*** *managers, although I'm sure there are many such people. Rather, she presents experts and examples showing that there is a new management style emerging which is less status and power conscious. The debate Billard shares is over whether attributing that new style especially to women is a good idea or is even true. I think she's an advocate (at least a mild one) of this new participative style because she didn't include information from those who think that style is ineffective or dangerous.*

After Reading ❹

Did your response contain some of these points about the Billard article?

- Billard is talking about management, not secretarial styles, so it's not relevant to bring in that argument.
- Maybe one kind of change that's "worth stirring up a little controversy" is letting people work in non-traditional fields.
- Several men are cited in the article for using participative styles; roles are not "gender-limited." There's lots of crossover.

Did you bring out some of these points from the Froiland rticle?

- Men have a hard time getting hired as secretaries; they're the victim of stereotyping just as women have been. For example, asking a male secretary if he sits on his boss's lap to take dictation.
- There are very few men in this field (less than 1%). As jobs become scarcer, the work a secretary does provides income—even if some people think of it as "menial, women's work."
- At least two of the men in the article have held their jobs for a very long time: 30 years and 18 years. That doesn't seem like "fill-in" work.

Ergonomics in the Workplace: The Workstation

Purpose for Reading

You will be reading Chapter 6: "The Workstation," which is one of three chapters in a section on workplace ergonomics. The section also includes chapters on space design and other environmental factors such as lighting, acoustics, thermal comfort, and air quality.

This chapter might be assigned as part of a unit on ergonomics that would be included on an exam. But in addition to providing information for a test, this chapter covers information that can make a major difference in your health and comfort. So you'll have the dual purpose of reading to pass a test and to apply the information to your own life.

Joyce, Marilyn and Ulrika Wallersteiner. Chapter 6: "The Workstation" in Part 3: "Ergonomics in the Workplace." Ergonomics: Humanizing the Automated Office. Cincinnati: South-Western, 1989: 82-99.

Before Reading ❶

If you haven't already done so, make sure you're familiar with the definition of **ergonomics**. If you were just starting the textbook, you'd expect the authors to provide a definition, but starting in Chapter 3 means you have to do the defining yourself. It's a good idea to make an effort to write your own definition first, then consult a dictionary or other source.

Write your definition here, then use an outside source such as a dictionary or glossary to improve what you've written:

Before Reading ❷

Preview the chapter to get an idea of the content as well as how difficult and how interesting you find the material. All of this information will be needed as you prepare to read the chapter.

Look at the following during your preview:

- Chapter Goals
- headings and subheadings
- pictures, diagrams, and charts

In addition, take time to read the Summary, Key Terms, Review Questions, Discussion Questions, and Problem/Issues.

Jot down for yourself what the chapter covers as well as how hard and interesting it seems. Write your response here:

During Reading

Did you notice how many main sections there are in the chapter? They might offer convenient stopping places if you decide to break your reading into more than one sitting. Planning breaks before you start helps you get through the material more efficiently. You're more likely to complete the assignment if you know clearly how long it will take.

Just to make sure, count the major sections in this chapter. Write the number here: _____

Now you're ready to read the chapter.

After Reading ❶

Can you answer the Review Questions on page 3A-22 either from memory or by looking back at notes you made?

If so, GREAT! Now your job will be to continue reviewing the answers until the time of the exam.

If not, there's no time like the present. Look back in your text for the answers to each of the eight questions, providing some type of marginal clue to the question and answer.

After Reading ❷

Don't forget to take time for yourself with this chapter. Following the suggestion in Discussion Question #1 (page 3A-23), think about a work area which you could change as a result of reading this chapter.

After Reading ❸

When you feel ready, answer the test questions which are on the next page. Don't look back at the chapter. Make this a real test of your study efficiency.

Chapter 6:
"The Workstation"
EXAM

1. Awkward postures, constrained postures, repetitive movements, and emotional stress are

   A. indicators of a high stress workplace.
   B. the result of childhood trauma.
   C. precursors of retirement.
   D. causes of muscle fatigue and strain.

2. Prolonged sedentary positions are likely to lead to

   A. shortening of the spine.
   B. constrained posture.
   C. tendinitis.
   D. aggravation.

3. RSIs, CTDs, and CTSs result from

   A. repetitive movements
   B. emotional stress.
   C. physical discomfort.
   D. medical testing.

4. The executive stretch, the short shrug, the tummy tucker, and the agile ankler are examples of

   A. types of employees.
   B. sexual harassment.
   C. rest pauses.
   D. compensations for poor design.

5. The design of tools, office layout, and work procedures can be improved through the use of

   A. conventional furniture.
   B. anthropometry.
   C. genetic engineering.
   D. participatory management.

6. Modular furniture allows components to be put together in a variety of ways

   A. but they are generally either panel-dependent or freestanding.
   B. but they use cantilevered mechanisms in any case.
   C. but the individual components are not generally adjustable.
   D. but they are only used for specialized workstations.

7. According to ANSI standards, work surface depth

   A. must be a maximum of 20 inches.
   B. cannot be less than 36 inches.
   C. depends on equipment size and task requirements.
   D. must be based on the height of the individual employee.

8. Slouching occurs because of changes which take place during sitting in

   A. the ligaments.
   B. the pelvis.
   C. kyphosis.
   D. the lumbar curve.

9. In choosing an ergonomically designed chair, it is important to

   A. choose a dynamic chair which adjusts to you.
   B. find one which has a seat pan of at least 22 inches.
   C. avoid chairs with armrests.
   D. consider kneeling chairs for long term use.

10. Workstation accessories

   A. include footrests, document holders, and wrist supports.
   B. can add ergonomic features to a poorly designed workstation.
   C. can improve an ergonomically designed workstation.
   D. all of the above.

Ergonomics in the Workplace: The Workstation

Joyce, Marilyn and Ulrika Wallersteiner.
Chapter 6: "The Workstation" in Part 3:
"Ergonomics in the Workplace."
Ergonomics: Humanizing the Automated Office.
Cincinnati: South-Western, 1989: 82-99.

Reprinted with permission from
South-Western Publishing Co.

For permission to reprint
for classroom use,
contact:
Ms. Donna Shelton
South-Western Publishing Co.
College Division
5101 Madison Road
Cincinnati, OH 45227
Phone: (513) 271-8811

PART 3

Ergonomics in the Workplace

Chapter 6 The Workstation

Chapter 7 The Environment: Space Design

Chapter 8 The Environment: Lighting, Acoustics, Thermal Comfort, and Air Quality

You can't manage people—you can only work with them. For your business to succeed, you must work closely with them and take exceedingly good care of them. This is not a chore or a responsibility. It is the most rewarding aspect of being in business.

*Paul Hawken, "The Employee as Customer," **INC.**, November 1987, p. 21.*

BEST COPY AVAILABLE

CHAPTER GOALS

After studying this chapter, you will be able to

1. describe the causes of and some means of relieving musculoskeletal discomfort.
2. explain the term anthropometry and discuss its importance in selecting office furniture.
3. describe the difference between panel-dependent and freestanding modular furniture.
4. list the workstations/dimensions recommended by the American National Standards Institute (ANSI).
5. describe the characteristics of an ergonomic chair.
6. list the workstation accessories which can help provide musculoskeletal comfort.

The Pilgrim Equipment Company was growing rapidly, but it seemed to Arthur Johnston, facilities manager, that it was growing too fast. After hiring new staff, the company had recently computerized its order processing. But things were not running as efficiently as Arthur had thought they would. Christa Washington, Sam Stein, and some of the new staff complained of pain in their lower backs and down their legs after several hours of working in their new chairs. Although the chairs they were sitting in were fashionable and attractive, the workers insisted that they were uncomfortable. Then Jackie Terrence, the vice president, had heard about kneeling chairs being good for the back, so she asked Arthur to enquire about them. Ben Lee, Leslie McBride, and Ed Sherman complained that the terminals took up too much space and did not leave enough table surface to lay out and review their new computerized drafting plans. Arthur wondered about all these problems. "Maybe the furnishings aren't quite right for the new types of tasks

everyone is doing," he thought. Then he remembered that only yesterday a catalogue crossed his desk advertising ergonomic furnishings that promised improved health, comfort and productivity. "Maybe I can solve everyone's problems with this type of furniture!" he said.

THE WORKER-WORKSTATION INTERFACE

In Part 2, you examined the role of office workers in relation to the work they do and the equipment and software they use. Now, in Part 3, you will examine the workplace itself, beginning with the needs of the worker within his or her own workstation, and then expanding into the overall office environment.

Many office workers today report soreness or aching in their lower back, neck, and shoulder areas. Some computer operators have even noticed numbness or tingling in their fingers or hands. You may wonder how it is possible to develop all these aches and pains working in what seems to be a relatively safe environment. But, as you recall from previous chapters, the absence of ergonomic considerations in equipment and software design can lead to visual problems and mental stress. Similarly, failure to apply ergonomic principles in the design of office furnishings can lead to physical discomforts in various parts of the body. The workstation, including work surfaces, chairs, and workstation accessories, is the fourth Key Element of ergonomics and will be addressed in this chapter.

After reading this chapter, you should be able to reduce any discomforts you experience sitting at your own workstation, and, as a manager, be able to make appropriate recommendations for improving the workstations of the workers for whom you are responsible. It is important to apply ergonomic principles to all furnishings, including those in workstations with and without terminals.

Causes of Discomfort

Research over the past decade has shown that muscle fatigue and strain in office workers can be caused by the following: awkward postures, constrained postures, repetitive movements, and emotional stress.

Awkward Postures. What kind of posture do you think a very tall individual would have to assume if he or she sat at a very low worksurface? Most tall people would probably slouch. When your spine is not straight, usually because you must lean or twist toward poorly arranged work materials, stress is placed on your spine. Repeatedly assuming these awkward postures can lead to serious postural problems, such as chronic back pain, in the long run. This topic will be discussed later in greater detail as it relates specifically to the sitting posture.

Constrained Postures. You have no doubt found that after long periods of sitting, such as when driving a long distance, your muscles become stiff. Your arms get tired from holding onto the steering wheel and your upper arm, shoulder, and neck areas feel tense from fixing your head and eyes on the road. Similar problems are experienced by office workers using typewriters or terminals. Both the hands and the head must be kept in a fixed position, so that the individual can read the printed page or screen as he or she keys. To hold this posture, the arm, neck, and shoulder muscles are tensed, which reduces the blood circulation in these areas and the delivery of nourishment to the muscles.

For short periods of time, maintaining this fixed posture does not pose a problem. However, many office jobs today require prolonged **sedentary** sessions. If the office furnishings do not support the variety of positions assumed by the office workers, and do not encourage proper posture, muscle tension is prolonged and aggravated.

sedentary
sitting for prolonged periods of time

Repetitive Movements. As discussed in earlier chapters, some office jobs are extremely repetitive, consisting of little more than operating a numeric keypad throughout the day. One concern with this type of work is that repeated, rapid finger and hand movements that use the same movement pattern concentrate physical stress on a small part of the musculoskeletal system, causing irritation and inflammation of the **tendons** in that area. This sort of injury is usually referred to as **repetitive strain injury (RSI)** or **cumulative trauma disorder (CTD)**. Additional irritation of the tendons may be caused by wrists either being in a flexed (down) or extended (up) position or by wrists rubbing against or resting on sharp edges. When workers experience tingling or numbness in their fingers, this condition is referred to as **carpal tunnel syndrome (CTS)**. To avoid CTS, all tendon irritation at the wrist must be prevented.

tendons
tough cords or bands of tissue that connect muscles to bones

Emotional Stress. Although the physical demands of the job are the main source of musculoskeletal strain in office work, emotional or psychological stress may also cause problems. As a student, have you ever come out of an exam feeling a big knot between your neck and your shoulder blades? The everyday pressures of an office — deadlines, meetings, conflicts with co-workers — can cause a similar feeling in the office worker. This psychological stress is often associated with an increase in muscle tension. Thus, muscular tension which would ordinarily not cause injury may be more intense and create greater problems if the office worker is also suffering from psychological stress.

Relief From Discomfort

In order to relieve postural discomfort in office workers, it is necessary to apply the concept of mini rest pauses and introduce properly designed workstations.

Rest Pauses. You learned in Chapter 3 that taking short rest pauses is one way of obtaining some relief from the physical and emotional stress encountered on the job. Some organizations recommend that workers who are involved in intensive terminal work take 10-15 minute breaks away from their workstations every hour. A better solution for all office workers is to take physically active rest pauses at their workstations throughout the day. A **rest pause** is a mini break of 1 minute to 3 minutes taken at the worker's discretion. Studies have shown that, rather than waiting for the conventional coffee breaks and lunch hour, taking exercise breaks that last from 1 minute to 3 minutes will help everyone feel much better at the end of the day and accomplish much more during the day. Try it yourself. Four mini exercises to do during a pause are shown in Figure 6-1. Take time now before reading on to try all four exercises.

Do you know why you feel better after doing these exercises? As you recall, fixed and awkward postures require muscle contraction, which diminishes the blood flow. By stretching and changing the positions of these muscles, you improve circulation and also give your posture muscles a chance to relax.

Properly Designed Workstations. Problems of constrained and awkward postures are frequently caused by poorly designed workstations. For instance, if you are working at a terminal while seated in a chair that is too low, you must raise your arms and elbows to use the keyboard — which isn't very comfortable for very long. If the work surface is too low, you must lean forward to read a document — thereby placing added stress on your neck and lower back muscles. Office workers also frequently complain that they don't have enough work space for all the equipment and paperwork that must be used at the same time, causing paper to pile up and keyboards to be awkwardly located. Such work spaces are not very efficient or productive because the worker is constantly compensating for poor design. This brings us to the topic of office furnishings.

Remember how in Chapter 3 you had to analyze the job tasks in order to determine the work surface, shelving, and drawer requirements? You must also be able to identify the critical dimensions of an individual in order to select the correct chair dimensions and work surface height for that person. Workstation design will be discussed in more detail later in this chapter.

Anthropometry

You'll recall from your study of Chapter 1 that anthropometry is the measurement of the physical dimensions of human beings. The next time you are in a classroom, look at the other students. Notice the different sizes and shapes — some students are very tall, while others are very short. You will also see a difference in proportion. Some have

Figure 6-1

1. The Executive Stretch

Place your hands behind your head. Pull your elbows as far back as possible. Hold for a few seconds. Relax and repeat.

2. The Short Shrug

Let your arms hang freely by your sides. Raise your shoulders up to your ears. Hold for a few seconds. Relax and repeat.

3. The Tummy Tucker

Place your hands on your stomach. Inhale and pull in your stomach. Exhale and relax. Repeat this exercise pulling and pushing your stomach muscles in and out.

4. The Agile Ankler

Stretch one leg out in front of you. Slowly rotate your foot at the ankle to the right a couple of times and then to the left. Relax. Repeat this exercise with the other leg.

BEST COPY AVAILABLE

longer legs and shorter upper bodies, while others have shorter legs and longer upper bodies. Some students are confined to wheelchairs, which, in turn, means that the dimensions of the wheelchair also have to be taken into consideration. Studies have shown that there is considerable variation in dimensions within and between sexes, ages, and ethnic groups.

Anthropometric measurements are extremely useful in designing not only things people wear, but also the layout and dimensions of things people use, such as office furnishings. Anthropometric knowledge makes it much easier to determine such things as where to place storage units for easy reach, which chairs will suit most of the people in your office, or how wide the space underneath the work surface must be to accommodate an individual in a wheelchair. Not only work surfaces, chairs, and equipment, but also work procedures are based on the anthropometric measures of workers.

OFFICE FURNISHINGS

Office furnishings today generally incorporate flexibility, in terms of adjusting the workstation components to both the individual's physical dimensions (anthropometric measures) and the requirements of the job. There are many design variations, but office furnishings include work surfaces, chairs, storage and filing units, and divider panels. Office furniture is commonly classified into two broad categories: *conventional furniture* and *modular or systems furniture*. Based on the job task analysis you did in Chapter 3, you will be able to identify the appropriate work surface, shelving, and storage requirements for a given workstation. The furniture selected should be suitable for the types of tasks performed and, where possible, be adaptable to multipurpose use.

Conventional Furniture

Conventional furniture is an organization of independent furniture components, such as freestanding desks and credenzas, filing cabinets, and bookshelves. Conventional furniture often is heavy and therefore difficult to move once it is in place. Except perhaps for certain kinds of chairs, conventional furniture typically is unadjustable.

Conventional furniture was common in the traditional offices of the seventies and early eighties. A typical office might have had rows of conventional desks in a large, open area with file cabinets clustered in a centralized location or strung along an outer wall. There was little if any privacy unless, of course, the worker had one of the several walled-in offices.

Due to the widespread acceptance of office automation, businesses today are recognizing the value of furniture that is adjustable, easy to move, and multipurpose. Therefore the trend is toward modular rather than conventional layouts.

Figure 6-2
The use of conventional furniture is decreasing as more offices become automated.

Modular Furniture

Modular or systems furniture involves an integration of interdependent components that can be quickly and easily assembled, disassembled, and rearranged to meet employee and department needs. A **module** is one unit or component of office furniture, such as a work surface, shelving, or a storage compartment. Today's modular furniture has evolved to include a variety of configurations that typically incorporate both panel-dependent and freestanding components.

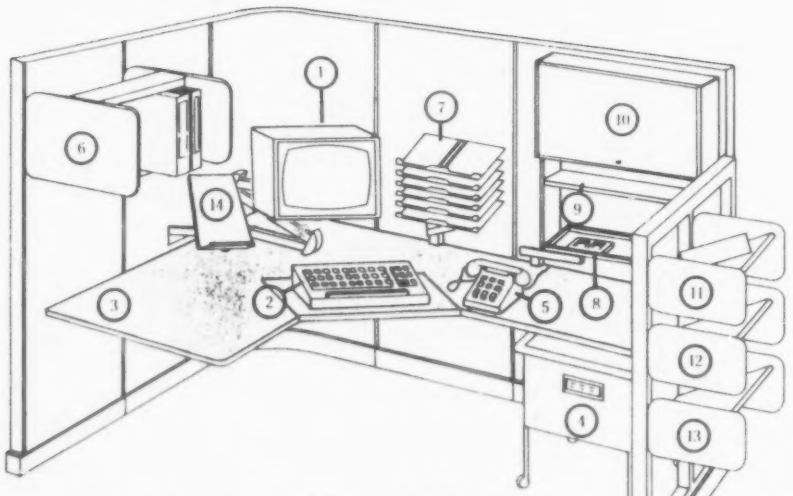
Panel-dependent modular units are supported by divider panels and poles. In Figure 6-3 on page 90, you can see that the panels act as the legs of the workstation. The workstation components are hinged to the panels using a **cantilevered** mechanism, with slots on either end of the panel. The slots are usually spaced one inch apart to enable the office worker, with the help of some furniture movers, to move the components up or down according to their physical needs. However, this is not something you would do every day. In fact, you most probably would adjust the components only once when you moved into the workstation.

cantilevered
a projecting structural component that is supported at only one end

Most work surfaces are a solid table top. Many of the newer work surfaces have a separate surface for a keyboard that can be adjusted in height by the worker. (See Figure 6-3 and also Photo 15 on page I of the Photo Section.) Frequently, you will find monitor supports being used with modular work surfaces. A monitor support allows you to position the screen in such a way that the screen is correctly adjusted in height and orientation so your neck, shoulders, and arms can be comfortable as you key.

Freestanding modular workstations do not rely on panel dividers for structural support. Freestanding modular work surfaces can be configured to the required size by adding or removing attachable work surface components. (Refer to Photo 6 on page D of the photo section) Some freestanding workstations have been specifically

Figure 6-3
This panel-dependent workstation has detachable components that can be adjusted to fit a worker's individual needs.



1. Video display terminal
2. Keyboard
3. Primary workstation area
4. Files storage
5. Telephone
6. Storage for procedures manuals and equipment manuals
7. Forms caddy
8. Pens pencils caddy
9. Additional supplies storage
10. Personal storage
11. In basket
12. Out basket
13. Additional basket
14. Document holder

designed for full-time computer users. As you can see in Figure 6-4, various parts of the workstation are adjustable in order to maximize user comfort. Such specialized workstations are frequently used in conjunction with specialized functions, such as word processing or data entry.

The amount of space required for a modular workstation is typically less than the space required for conventional layouts. Vertical space (panels) is used for hanging shelving and storage units in modular layouts while conventional layouts require floor space for shelving and storage cabinets.

WORKSTATION DESIGN

Office workstations must be designed carefully to meet the needs of the staff and to accomplish the goals of the company. The designer of a workstation should know what activities are being performed at that station and what documents, reference manuals, files, and equipment will be used in performing the various tasks. Imagine if part of your job was sorting through large file folders and letter-size sheets of paper as you filed the incoming mail. It would be difficult to work effectively if your workstation was only large enough to stack the opened letters. The work space would be too cramped for you to open the large file folders and sort through the contents.

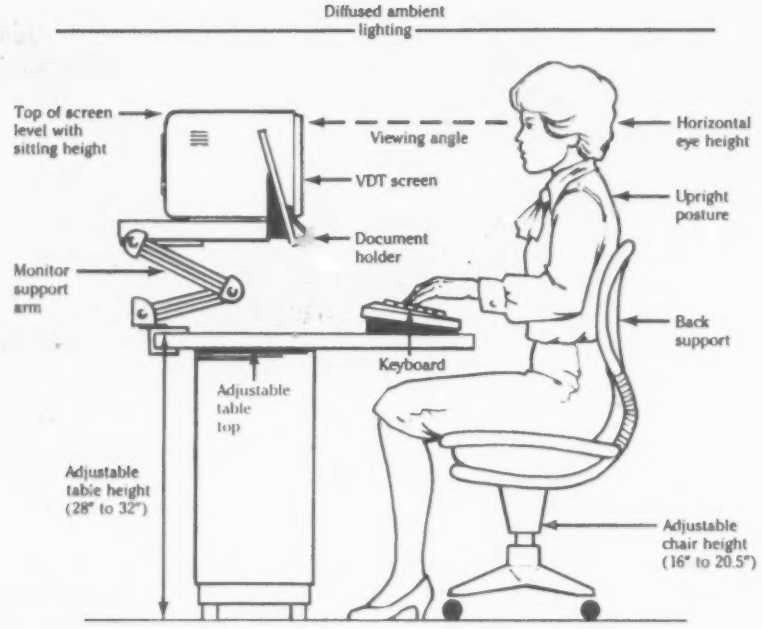


Figure 6-4
This freestanding workstation is adjustable for maximum user comfort and efficiency.

A designer must also know what the sequence of job activities is or if there are any special tasks associated with a workstation (for example, if a budget printed on large computer sheets must be reviewed once a month). If papers are delivered to your workstation on the left-hand side, after which you process them and stack them on the right-hand side, a good designer will allow enough space on both sides so that both sets of papers are within easy reach. The task analysis described in Chapter 3 is a good source of information for designers.

> Gillian Erb, the office manager, discovered that when computers had been introduced into her department, no one redesigned the workstations to be suitable for the new terminals. The office workers had less space on their work surfaces than before, and were not capable of handling the larger amount of paper generated by the computer system. In addition, many of the people who had terminals on their desks did not use the terminals as much as initially anticipated, and could have shared a terminal with several other users to save space. Gillian brought the situation to her supervisor's attention, and they decided to analyze each worker's job more closely and then decide how the office furniture should be designed and where the terminals should be placed.

The more time you spend at a workstation, the more critical it becomes that the workstation meet your individual needs. Ideally,

you should be able to adjust the furniture, the writing surface, the terminal screen surface, and the keyboard surface.

Recommended Dimensions for Work Surfaces

The work surface is a very important component of the office workstation. Work surfaces ultimately determine the amount of work space you have to complete your assigned tasks. You may be surprised to discover that work surfaces also can have an effect on your visual and physical well being.

As you just learned, today's modular or systems furniture has evolved to include a variety of configurations that typically incorporate both freestanding and panel-dependent components. The kind of work surface components you may recommend for an office depends, in certain cases, on the individual worker, the specific job functions of that worker, and the space available. For example, an office manager usually needs a large, flat, writing surface with a side surface for a terminal; while a data retrieval worker only needs an adjustable work surface that can accommodate the screen and the keyboard at different heights. Also, a workstation needs to be wider and somewhat higher to accommodate an individual in a wheelchair. Figure 6-5 lists general workstation dimensions recommended by the **American National Standards Institute (ANSI).**

Figure 6-5

RECOMMENDED DIMENSIONS	
A. Overall work surface height	28-32 Inches
B. Keyboard surface height	23-28 Inches
C. Leg space width (minimum)	24-30 Inches
D. Work surface depth	Dependent on equipment size and task requirement
E. Thickness of work surface	One inch

Storage Units

Frequently there is not enough space in a workstation to store paper, records, office forms and supplies, reference books, and personal belongings such as a lunch, jogging shoes, and handbags. A task analysis, as discussed in Chapter 3, will help determine the storage needs for various types of jobs in a department. Not only must the amount of paper, supplies, etc. be estimated, but the designer must look at the types and sizes of storage media used in the different workstations — regular-size file folders or legal-size file folders, computer printout or ring binders, etc. Furthermore, to conserve space, it is also useful to determine how frequently the materials are needed. There is no point in having a workstation drawer for legal-size files, for example, if your job only requires you to refer to these files once every few weeks.

Where should the filing and storage units be located in a given workstation? That depends in part on the frequency of use and on

anthropometry, which you will recall is the measurement of the physical dimensions of human beings.

SEATING

Back pain or discomfort is one of the most common complaints of office workers. To fully understand how office work can result in back strain and how solutions recommended in this text can help, it is necessary to have a basic understanding of the anatomy of the back and its relation to sitting.

Your Back and Sitting

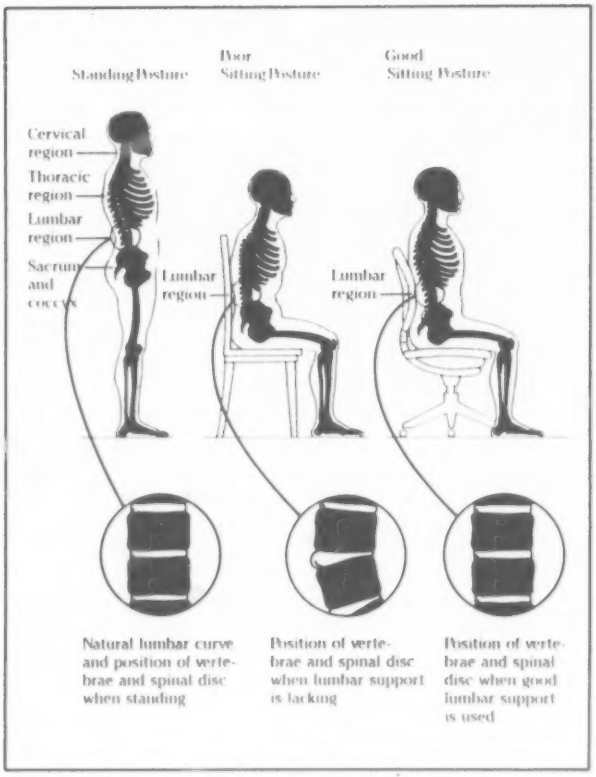
The spine is a very complex structure. It consists of a series of separate bones called **vertebrae**. The vertebrae are separated by softer tissue known as **discs**, which act as cushions and give the spine its flexibility. The discs prevent the vertebrae from grinding against one another, permit the spinal nerves to freely branch out to the various body parts, and allow the spine to be flexible. The whole structure is held together by muscles and ligaments, which attach one vertebra to the next.

As you move from a standing position to a sitting one, the top of your hips (pelvis) rotates backward. The lower back, or lumbar curve, starts to disappear and your spine begins to flatten, or go in the opposite direction. This is known as **kyphosis** (commonly referred to as slouching). Try this exercise to feel the effects of this change in position.

1. First, with a chair behind you, stand up as straight as you can and pull your shoulders back. Be aware of the feeling in your back. Reach behind you and run one of your hands down your lower back. Can you feel the inward curvature of your spine?
2. Now, concentrating on maintaining that curve, slowly sit down. You will notice at first that the curve hasn't changed much. That is because your hips have rotated backwards. But as you complete your descent into the chair the curvature is less pronounced.
3. Wait a little bit longer and you can feel that you begin to slouch, especially if your chair doesn't have adequate back support.

Sitting in a slouched position increases the pressure on the discs because in this position they are pinched in the front and stretched apart in the back. See Figure 6-6 on page 94. After years of chronic pressure the discs will wear down and your ligaments will become overstretched. The diagram shows how the discs in your back are positioned when you are slouching and when you are sitting in a chair with proper back support. Notice how much more pressure there is on the discs when you are slouching.

Figure 6-6
An ergonomic chair provides proper back support and, therefore, helps to prevent back problems.


Standing Posture
Poor Sitting Posture
Good Sitting Posture
Cervical region
Thoracic region
Lumbar region
Sacrum and coccyx
Lumbar region
Lumbar region
Natural lumbar curve and position of vertebrae and spinal disc when standing
Position of vertebrae and spinal disc when lumbar support is lacking
Position of vertebrae and spinal disc when good lumbar support is used

When the discs become worn, the separations between the vertebrae are reduced. This causes increased back stiffness, irritation between adjacent vertebrae as they come into contact, and, possibly, even painful pinching of the nerves where they exit between the vertebrae. A good, ergonomically designed chair can prevent this effect.

Ergonomic Seating

What kind of chair are you sitting on now? Are your feet flat on the floor or do you feel a pinching underneath your thighs as they contact the seat edge? Does the backrest curve outwards to help you maintain your lumbar curve or are you slouching in your chair? **Lumbar curve** refers to the lower back region of the spine. This curve takes a concave shape when you sit properly. Where exactly does the backrest (lumbar support) touch your back? Is it a little too high or a little too low? Can you adjust it up or down? If your chair creates any pressure points in your body, it is not ergonomically designed. Does the seat of your chair adjust in height? When you lean forward can the backrest be adjusted so that it also gives you support in the forward position? Can

you adjust the seat pan tilt forward and back to the horizontal position? **Seat pan** refers to the chair structure one sits on. If your chair doesn't have at least these features it is not a dynamic chair — that is, it does not adjust to your physical dimensions and task demands.

If you were given the responsibility of buying one chair that would be comfortable for every one of your classmates, how would you decide which chair to buy? This question brings us back to anthropometry. Knowing the anthropometric dimensions of your classmates would help you choose the chair that would suit the greatest number of students. To simplify choosing chairs, ANSI has reviewed available anthropometric tables to determine suitable seat pan depth and width, backrest width and height, and the critical location for supporting the lumbar curve. These dimensions are shown in Figure 6-7.

Ergonomic seating involves more than just having the right chair with the appropriate dimensions. An ergonomic chair must be adjustable so that a variety of positions can be assumed throughout the workday. In a sense, adjusting your seating is another way to take mini exercise breaks. However, it is essential that you are trained to operate the adjustments because a chair with ergonomic dimensions that is not properly adjusted to your needs is just another chair.

What about armrests? There is no evidence to support the old belief that secretarial and clerical chairs should be without armrests. In the past this may have been appropriate; but today armrests are used for providing muscle relief and support to the upper arms. To have armrests or not to have armrests is really a matter of personal preference. An ergonomic chair gives the worker the option of attaching or removing the armrests.

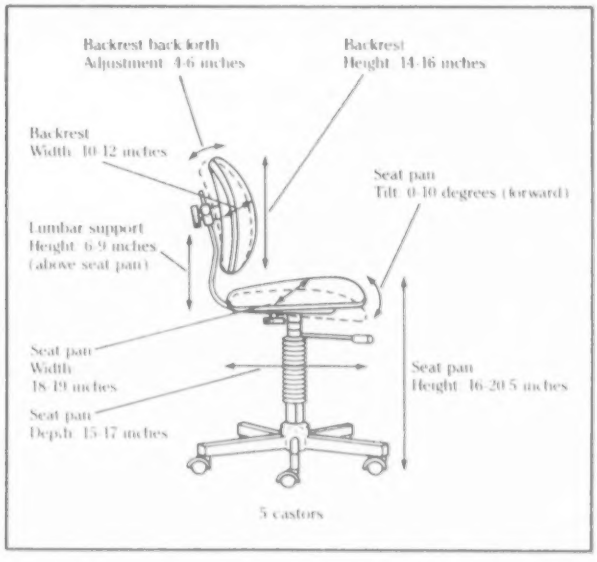


Figure 6-7
An ergonomic chair must be adjustable.

Kneeling Chair

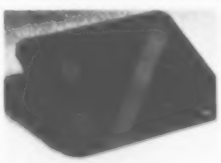
Have you seen chairs without backrests that people appear to be kneeling on? These chairs are called **kneeling chairs** because the user is supported by his or her knees. Kneeling chairs provide similar benefits to those obtained sitting in a conventional ergonomic chair with a positive seat pan tilt. However, these chairs often create problems for workers. First of all, with these chairs only your knees provide postural support. Many people suffering from knee problems will find this very uncomfortable. Second, you cannot sit in these chairs in any other way other than in the kneeling position. As you have learned, sitting in one position for prolonged periods of time can be very tiring. Third, office workers who frequently get up from their desks will be uncomfortable because the chairs are awkward to get in and out of. And last, sitting without a backrest support is very tiring to your back muscles, so you slowly move into a bent-over posture.

A kneeling chair may be fun to have at home, where you are free to get up and choose another chair when you tire of it, but it is not really suitable in the office where comfort and postural support are essential. In addition, for the price of this chair (which has only one ergonomic feature — the positive seat tilt) you can buy a conventional ergonomic chair that offers many more features.

WORKSTATION ACCESSORIES

Workstation accessories can add ergonomic features to a poorly designed workstation, and they can improve a workstation which has been ergonomically designed. Workstation accessories generally are add-ons such as footrests, document holders, and wrist supports.

Figure 6-8
A footrest (below) and document holder (on the next page) can make you more comfortable at work.



Hamilton Sorter Co., Inc.

Footrest

To properly adjust your posture to a fixed work surface height, you must raise or lower your chair. After adjusting your chair, you may notice that your feet don't reach the floor and the seat edge digs into your thighs. A footrest, which is basically a sloped box on which to place your feet, can help. A good footrest must be heavy enough so that it will stay in one spot when your feet are resting on it, and there must be enough room for both feet and a little extra space for movement.

Document Holder

A document holder is useful to help prevent the hunched-over posture many office workers assume when keying in information from a source document. A document holder is either free standing or attached to a flexible equipment arm on which to place materials vertically.

Because back pain or discomfort is one of the most common complaints of office workers, it is essential that these workers have adjustable, ergonomically designed chairs that provide proper back support.

By selecting appropriate footrests, document holders, and wrist supports, additional postural relief will be gained. To obtain the maximum benefit of all these design features, workers must be trained in how to adjust the workstation according to their specific needs. To satisfy the different dimensions of an entire office population, it is necessary to have adjustable seating and work surfaces that conform to the ANSI standards.

KEY TERMS

American National Standards Institute (ANSI)
carpal tunnel syndrome (CTS)
discs
kneeling chairs
kyphosis
module
lumbar curve
repetitive strain injury (RSI) or cumulative trauma disorder (CTD)
rest pause
seat pan
vertebrae

REVIEW QUESTIONS

1. Describe four causes of musculoskeletal discomfort that occur in office workers.
2. Explain the importance of rest pauses and describe one exercise that relieves musculoskeletal discomfort.
3. Define "anthropometry" and discuss its importance in selecting office furniture.
4. Describe the differences between panel-dependent and freestanding modular furniture.
5. List the workstation dimensions recommended by ANSI.
6. Describe the negative effects of inadequate work space and the process for assuring that work space is adequate.
7. List the critical dimensions of an ergonomic chair.
8. List the workstation accessories that can help provide musculoskeletal comfort.

DISCUSSION QUESTIONS

1. Select an activity and a place (for example, studying at your desk, completing a task at your job, working on your hobby in your garage). Then discuss how you could improve your work area, (i.e., change seating, redesign work surface, etc.) and tell what effect these changes would have on your work and on your comfort.
2. Select two of the three computer accessories mentioned (footrests, document holders, wrist supports) and discuss in detail on how they could help prevent or alleviate some of the musculoskeletal problems presented in the chapter. (Think about the information provided on the anatomy of the spine if relevant to your selection.)

PROBLEMS ISSUES

1. Select any desktop or work surface that you or someone else uses. List all the items used on that surface. Measure each item and then determine whether the surface is adequate for the activities performed there. If not, what would you suggest? Supplement your discussion with a sketch of the desktop or work surface.
2. Locate two chairs used for computer use in a home, school, or work setting. Evaluate them according to the discussion of seating in Chapter 6. Write a brief comparison that includes the good and poor features of the chairs. Entitle your comparison "Critique of Two Currently Used Computer Chairs."
3. Based on the information in Chapter 6 on rest pauses and typical computer-user musculoskeletal discomfort, research additional exercises that might be used during a one- to three-minute "break." Be prepared to teach the exercises to your classmates.

Ergonomics in the Workplace: The Workstation

Before Reading

1 Did you have any difficulty finding **ergonomics** in your dictionary? The Random House College Dictionary I bought in 1990 had only a one-word definition: biotechnology. The next edition seems to have realized that this was a term that was getting wider use and therefore deserved more attention. In the 1991 Random House Webster's College Dictionary, the definition included the information that the word came into the language around 1945-1950, and that it is a combination of a Greek word for work (erg-) with the last part of economics. It's defined as "an applied science that coordinates the design of devices, systems, and physical working conditions with the capacities and requirements of the worker. Also called human engineering."

For those of you who are curious about how the textbook's authors define this term, the following definition is taken from their Preface (page iii):

> Ergonomics ["ergon" (work) + "nomos" (natural laws)] is the science of work. Specifically, it is the science that addresses people's performance and well-being in relation to their job tasks, their equipment, and their environment. The key to understanding the true value and role of ergonomics is knowing that an organization's most important resource is people. Therefore, anything that contributes to the performance, health and well-being, and commitment of the workforce is important to both the employer and the employee.

Before Reading

Are the terms "musculoskeletal" and "anthropometry" worrying you? You may have seen the marginal definitions of new terms throughout the chapter, but those two terms are not among them. Anthropometry is defined on page 3A-11, but both of these words will yield to a little additional analysis.

musculoskeletal is a combination of muscles and skeleton, with an adjective ending.

anthropometry is a noun combining the Greek words for human being (anthropo-) with -metry which means "the process of measuring" and is related to the word "meter."

If the chapter seems very difficult, you may want to read an easier source on the same topic. If it doesn't seem too interesting, perhaps you can focus on the fact that there will be exam questions in your future. Or you might talk with someone who's sustained an RSI; they'll be very interested in the topic, and you might catch their interest.

During Reading

The *main* headings in the chapter are "The Worker-Workstation Interface," "Office Furnishings," "Workstation Design," "Seating," and "Workstation Accessories," along with the summary, etc., at the end.

Did you answer 5?

If you do break up your reading, plan to make notes (underlining and/or marginal notes) at the end of each study session.

After Reading

If you don't agree with one of these answers, look back in the chapter to find the evidence which will support your response.

1. D
2. B
3. A
4. C
5. B
6. A
7. C
8. D
9. A
10. D

Guerilla Ergonomics

Purpose for Reading

This article from WordPerfect Magazine might be recommended reading for a unit on ergonomics. It would complement textbook assignments and be a part of the information tested on a major exam. In addition, however, this article may provide ideas which you can use to improve the comfort of your own work or study space.

You should have read "Ergonomics in the Workplace" in the preceding Guide before starting this one.

Dainoff, Marilyn and Marvin Dainoff. "Guerilla Ergonomics." WordPerfect Magazine. May 1992: 42-45.

Before Reading

Prepare to read this article by doing a preview which includes the

- title and subtitle
- picture
- headings and featured excerpts
- author identification at the end

Did you get a sense of what the authors have to say as well as how difficult and interesting you expect it to be? If so, your preview was effective.

If any words or concepts you saw during your preview seem totally unfamiliar, it's a good idea to look them up before reading.

Many of the ideas in this article may be familiar, particularly since you've read the preceding textbook chapter on ergonomics. You might take a few seconds to review mentally what you already know. Having a good background can make reading much easier!

During Reading

As you read this article, keep in mind its dual purpose: to add information to a unit on ergonomics and to offer you advice about improvements in your own work spaces.

After Reading ❶

When you finish reading, think about what you've learned, and what ideas are emphasized in both ergonomics readings as well as what is unique about the ideas in this article.

Make whatever notes you think are appropriate, using both underlining and marginal notes, or making notes on separate paper.

To prepare yourself for the exam on ergonomics, imagine that your instructor has strongly hinted that there will be an essay question on the test which asks you to relate the information from this article to the information from the textbook chapter.

After Reading ❷

When you are satisfied with your study and review of the article, complete the test question on the following page without looking back at any of your sources.

"Guerilla Ergonomics"
ESSAY QUESTION

Compare the information in "Guerilla Ergonomics" with that in Chapter 6: "Ergonomics in the Workplace." Indicate points of similarity and points of difference between the two; include your evaluation of the two sources.

Draft your response on scratch paper, so that your final response represents not only your best ideas but well-edited writing as well. Point value = 10 points.

Guerilla Ergonomics

Dainoff, Marilyn and Marvin Dainoff.
"Guerilla Ergonomics." WordPerfect Magazine.
May 1992: 42-45.

Reprinted with permission from
WordPerfect Magazine, May 1992.

For permission to reprint
for classroom use,
contact:
Ms. Camille Soderquist
WordPerfect Magazine
270 W. Center Street
Orem, UT 84057
Phone: (801) 226-5555; FAX (801) 226-8804

GUERRILLA ERGONOMICS *The frugal person's way to a safe office*

Ergonomics can be defined as *the fit* between you and the tools you use—whether the tool is a shoe (a tool for walking and keeping your feet off the ground), the bench in a piano parlor (a tool for comfortable seating posture), or a computer workstation (a tool for using the computer easily and well).

The aspects of the fit between you and your work environment are related to the common physical problems most computer users have experienced: back problems, shoulder aches, numbness and arm and wrist problems. Some of these physical conditions can lead to very serious problems, such as damaged spinal discs or carpal tunnel syndrome.

But with some knowledge—and not necessarily a lot of money—most of these problems are preventable! That's where "guerrilla ergonomics" comes in.

"Guerrilla ergonomics" means making ergonomic improvements with materials that are free, cheap or readily available. An old phonebook, saved for months, may not look wonderful but makes a fantastic footrest. Old pressboard, even unused books, can make fine, inchworthy or monument. Placeholders can be book, or papers

by Marilyn Dainoff and Marvin Dainoff, Ph.D

BEST COPY AVAILABLE

GUERRILLA ERG

BEST COPY AVAILABLE

ONOMICS

The frugal person's way to a safe office

Ergonomics can be defined as *the fit between you and the tools you use*—whether the tool is a shoe (a tool for walking and keeping your feet off the ground), the booth in a pizza parlor (a tool for comfortably eating pizza), or a computer workstation (a tool for using the computer easily and well).

The aspects of the fit between you and your work environment are related to the common physical problems most computer users have experienced: back problems, shoulder aches, eyestrain and arm and wrist problems. Some of these physical conditions can lead to very serious problems, such as damaged spinal discs or carpal tunnel syndrome.

But with some knowledge—and not necessarily a lot of money—most of these problems are preventable! That's where "guerrilla ergonomics" comes in.

"Guerrilla ergonomics" means making ergonomic improvements with materials that are free, cheap or readily available. An old phonebook, taped for stability, may not look wonderful, but makes a dandy footrest. Old printouts, even unused books, can raise feet, keyboards, or monitors. Platforms can be built, or casters

by Marilyn Dainoff and Marvin Dainoff, Ph.D.

added, to raise work surfaces. If work surfaces need to be *lowered*, you can remove casters or use a saw to shorten legs.

Cushions placed on chairs can raise the height of the seat (seatpan); wedge-shaped cushions can substitute for a forward-tilted seatpan. Use your ingenuity! Be sure to avoid instability and fire hazards—and don't make irreversible changes (with the saw) before the entire work area is worked out in your mind.

Arrange your work area to suit yourself. There's no law that states the processor must be under the monitor, or that the monitor has to be directly in front of you rather than off to the side. The most important thing is that your work area fits *you*—your body and your tasks.

WATCH YOUR WEAKNESSES

Seated at the computer, the human body is most vulnerable in the lumbar area of the spine, and at the wrists. Any ergonomic workstation must promote healthy posture in these two areas. Otherwise, disability can occur—sometimes without much warning pain. The most crucial piece of equipment for wrists and the lower back is the chair.

Be forewarned that the marketplace is full of equipment touted as "ergonomic," which has about as much clout as "new and improved." The price tag isn't a reliable indicator, either. If you don't know, and the salesperson can't reasonably explain *why* something is good for you, look elsewhere.

If you have money to spend (we're talking about $400 to $1,000 for an industrial strength ergonomic chair), this is where most of it should be spent. The adjustment of the chair, as it relates to your body and to the keyboard, work surface and the task being done has a powerful influence on your health. The investment will pay off in comfort and saved medical expenses.

When you buy a chair, it must be suited for the tasks you want to do. Considering the price of a good ergonomic chair, a reputable dealer should allow you to try out your selection for a few days at your own computer.

If you can't invest in a chair at this time, try to figure out how some guerrilla ergonomics can help improve your current chair.

A good chair should provide lumbar support, be capable of locking in forward tilt, must orient your body so as to allow straight wrist postures while keying and should provide enough stability for you to do your task.

If you stand up and stretch with your hands reaching toward the ceiling, and then think about your lower back, you'll notice that just below your waistline, your backbone curves inward toward the front of your body. This curve is called *lumbar lordosis*.

When your spine is in lumbar lordosis, the faces of the spinal vertebrae are parallel to one another. This causes the vertebrae to exert even pressure on the soft, spongy spinal discs which are between each pair of vertebrae. If the plates are squeezed together at one side, however, the pressure is uneven, causing wear and tear on the pinched part of the balloon. This is what happens when the lumbar region curves backward (*lumbar kyphosis*), such as when you bend over to tie your shoes, or slump in your chair. Sitting for prolonged periods of time in lumbar kyphosis can be nearly as dangerous for the lower back as doing construction work.

THE MOST IMPORTANT THING IS THAT YOUR WORK AREA FITS YOU—YOUR BODY AND YOUR TASKS.

To maintain lordosis, your chair should have a lumbar support, which coincides with your lumbar curve. Since people have lumbar curves of different heights, the chair should have a separate back which can be adjusted up and down. Guerrilla ergonomic adaptations can be lumbar supports in the form of pads or pillows, which can be placed at the proper height on the chair (it will "feel" right). Some lumbar supports can even be worn around your waist.

A lumbar support is fine when you're sitting straight up, or leaning back against it—but what if you're leaning forward to read small print or operate your keyboard? It takes a lot of muscle work to maintain lordosis with a torso-to-thigh angle of 90 degrees or less. But it's easy to lean forward and maintain lumbar lordosis if your thigh bones are angled downward, making a torso-to-thigh angle of more than 90 degrees. Advanced ergonomic chairs will lock in this forward-tilting posture as well as the more conventional postures; your non-ergonomic chair can be adapted with an angled cushion. Sitting in forward tilt takes a couple of weeks of getting used to, but it makes preserving the lumbar curve very easy. The forward tilting posture raises your torso a couple of inches; if you use forward tilt you should raise your keyboard a couple of inches.

The front seatpan edge should be at the height of the crease behind your knee, so you can sit with your feet solidly on the ground (or a footrest) with your lower legs vertical. The seatpan should not be so deep that it cuts off circulation at the back of the knee.

If you sit as if you were typing, with your forearms parallel to the floor, you can demonstrate good and bad wrist posture. Any departure from a straight, flat wrist—whether your fingers point up toward the ceiling, or down to the floor, toward or away from each other—creates awkward postures that can be hazardous, especially if the fingers are making repetitive motions and you pound the keys. Typing softly while your forearm, wrist and the home row of the keyboard are in one plane is the best safeguard against damaging your wrists. Your arms and shoulders should be relaxed, the upper arms hanging vertically from the shoulders. The wrists and fingertips should be horizontal, or at most no more than an inch or two above your elbows.

Typing on a standard keyboard imposes a small angle on your wrists; don't exaggerate this by spreading your elbows or placing them on the arms of your chair. Don't use a wrist rest if it makes you angle

your wrists. If you can't keep your wrists flat, use the wrist rest *only* for resting!

PUTTING IT ALL TOGETHER

Once you have good posture in a good chair, and have coordinated the height of your keyboard, there are several other ergonomic adjustments you can make. For example:

• Your monitor should be at about arm's length from your body—as far away as you can comfortably read the type.

• Place the monitor vertically so that it's natural for you to hold your head straight—your chin should be neither down nor up. If you wear bifocals and can see the monitor through the tops of your glasses, the monitor should be high; if the reading portion of your glasses puts it into focus, lower the monitor so that your head is not angled. It's often easier to go without glasses if you're nearsighted, or to get glasses specially corrected for your eye-to-monitor distance.

• Paper copy should be placed on a copyholder—not flat on the work surface, which encourages one-sided, awkward head angles. The copyholder should be at about the same distance from your eyes as the monitor, so that the eyes don't have to re-focus at every glance. One good place for a copy holder is between the keyboard and the monitor; sometimes a rigid ruler placed there will do the job.

• Never place a monitor in front of or opposite a window, because of glare.

• To minimize glare, sit properly. Before you turn your computer on, check the monitor face for reflections. Any reflections you see will interfere with the display. Angling or tilting the monitor to eliminate reflected light sources can be helpful. Be sure the angle isn't so great it distorts the display. If there is still glare on the screen, make a deep visor for the monitor by taping black construction paper around the top and/or sides.

• A piece of foam or rolled-up fabric can serve as a wrist rest. There are also several wrist rests commercially available, including Media Recovery's *Wrist Ease* (214/630-9625), Jar Industry's *Keyboard Koozy* (800/876-2524) and JMJ Enterprises' *Comfort Wrist Rest* (714/472-4409).

• Don't type while holding the telephone on your shoulder! If you talk on the phone a lot while at the computer, invest in a speakerphone or a headset to save wear and tear on your neck and shoulders.

• Anything that makes you twist, turn, or bump into equipment, or that's awkward to use, can usually be placed in a more user-friendly position if you just think about it.

• Get up and walk around or stretch periodically. No one posture is good for long periods of time.

You can use "guerrilla ergonomics" to your advantage. Thoughtful, common sense application of these ideas will leave you feeling better. You'll have more energy, and be less likely to need to visit your doctor! ⌟

Dr. Marvin J. Dainoff is Director of the Center for Ergonomic Research at Miami University. Marilyn Hecht Dainoff is an author and consultant on ergonomic issues. They are the co-authors of *People & Productivity: A Manager's Guide to Ergonomics in the Electronic Office* published by MDA Books, 8606 Empire Court, Cincinnati, OH 45231.

After Reading ❷ Perhaps you can judge your answer by looking at the hand-written graded response below:

Both "Guerilla Ergonomics" and "Ergonomics in the Workplace" stress the importance of adjusting the work environment to fit each person individually. They both stress the chair as the most important piece of furniture because of its affect on the back, wrong word especially in maintaining the lumbar curve (lordosis). Both articles suggest adaptations Impressive! *which can be made to yield a more comfortable workplace: footrests, copy stands, and wrist rests are mentioned in both.*

The emphasis in "Guerilla Ergonomics" is on low cost modifications, while the textbook concentrates more on purchasing ergonomically-designed office furniture. For example, the textbook shows a picture of a specially constructed footrest, while the article suggests using an old telephone directory that has been taped for stability. The article places much more emphasis on the forward tilt feature of a chair, suggesting cushions which can be used if the chair is not built to support spinal curve in the forward-leaning position. The authors admit that this might take some getting used to, but I find it difficult to imagine that this adjustment would ever feel right to me. Both articles recommend wrist rests, but the article seems to suggest that the rests can be harmful if used improperly. Perhaps the Dainoffs had the benefit of more feedback from workers using the devices. Good!

Although there are some differences between the two, both sources stress the importance of a workplace that "fits." Dainoff and Dainoff can help me do that for less. If I were designing a new office, I'd prefer to have the information from the textbook because it contains ANSI standards and other information to guide me in the selection of office furniture and equipment that is ergonomically efficient.

Nice response! How about mentioning the common concern for wrists when keying for long periods?

9

BEST COPY AVAILABLE